

# **IRCC GCMS Technical Renewal Benchmarks**

## **Approach, Costing and Detailed Execution Workplan**

### **Draft Report**

Prepared for: Immigration, Refugees and Citizenship Canada

March 31, 2019

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# Creating a comprehensive and detailed program for IRCC for GCMS Renewal

## Benchmark Service Delivery Strategy and Design

## Benchmark GCMS TR Planning and Costing

## Provide Recommendations for GCMS TR Program

- Perform service delivery benchmarks to identify go-forward GCMS Renewal objectives, options and potential execution strategies for IRCC
- Understand future state business capability requirements, IT design principles, transformation objectives and functionality of market leading solutions. This informs the creation of a future state GCMS
- Based on the identified path forward for GCMS from an objectives, options and execution strategy perspective, Gartner will perform a series of benchmarks to support IRCC development of execution plans and costings
- Prioritize and time-sequence recommendations to be implemented for the next number of years for the GCMS Renewal program

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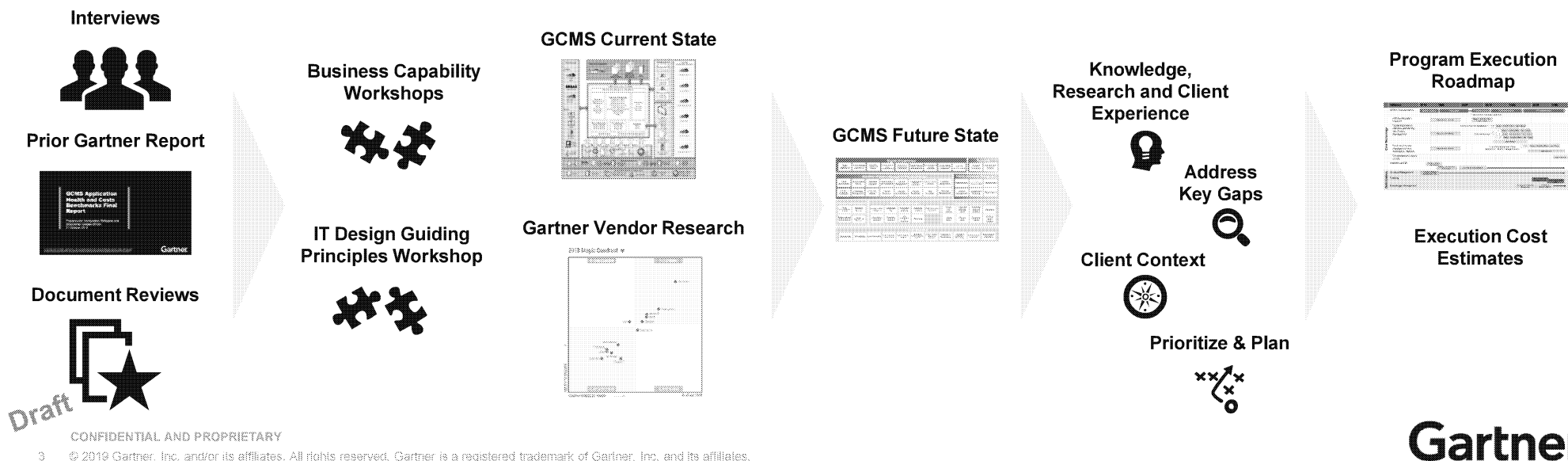
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## Development Approach — How this analysis was created

- The research, analysis, benchmarking and guidance contained in this report springboards off of the prior Gartner engagement GCMS Application Health and Costs Benchmarks delivered in Oct 2018.
- This engagement used a combination of interviews and workshops to establish a foundation of key requirements and design principles for the future. These acted as inputs, along with Gartner Vendor Research to create a technical and functional model for the future state GCMS Renewal. This report also examined solution and implementation options, generated costs estimates, and developed a multi-year program execution roadmap.
- Finally, the work was approached considering GCMS renewal as an opportunity for transformation, rather than just a system replacement.





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# GCMS Renewal – Technical Drivers of Change

- The Global Case Management System (GCMS) is the mandate-critical application for IRCC and is used worldwide to facilitate IRCC processes and programs. Started in 2001, over the past 17 years it has grown to accommodate multiple lines of business and numerous functional enhancements to facilitate core IRCC business processes
- GCMS also supports mission-critical programs for other departments including CBSA, ESDC, GAC, RCMP, and others. With over 20,000 users across the GoC, the optics and reputational risk for maintaining a reliable system are high
- GCMS has been and continues to be adapted since its original implementation, now acting as 24/7 operational system – something it was never meant to do. Further, many aspects of GCMS including the core, consist of a variety of technologies some of which are now redundant or outdated. Recently service outages have been more frequent and impactful
- Gartner Benchmark data indicate both development costs (21%) and support costs (27%) well above peer averages
- In global comparisons, GCMS ranks as a large and complex system, falling among the top decile of case management systems in Gartner's benchmarking database

IRCC should consider engaging these departments prior to renewal for their opinion, and even financial support

This is not trivial - IRCC needs to approach the renewal with the discipline and dedication of a major program

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# GCMS Renewal – Business Drivers of Change

- GCMS is challenged to keep up with the needs of the business
- Continually rising demand for services that is outpacing capacity
- Below average service levels
- Poor system performance and stability
- To date, service challenges have been solved with the addition of temporary resources or overtime – this is a costly and unsustainable solution
- While GCMS is challenged today, it still represents the core system for IRCC service transformation. The dependence on GCMS will only increase in the future (i.e. PPMI, Biometrics, Service Transformation)

Whatever the eventual solution, the effort will involve a considerable investment. GCMS Renewal should therefore be approached as an opportunity to re-examine all processes to re-design, re-engineer and seek step function increases in performance, not just a more reliable system. In short, a transformation not a system replacement

As benefits, GCMS Renewal should drive strategic outcomes such as: lower costs per unit, reduced cycle times, more accurate service delivery, enhanced quality of decision-making, improved resource allocation / targeted human intervention, application of analytics to triage and manage risk etc.

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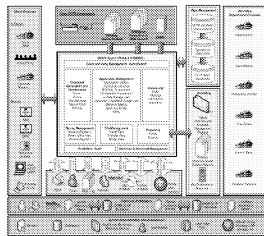
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# Approach

- The future state for GCMS Renewal outlines the major solution components and functionality. This articulation of the future solution incorporates many of the current capabilities and augments those capabilities with new and advanced capabilities to enable an operational and service transformation.
- The development of the future state was conducted with consideration of four inputs:

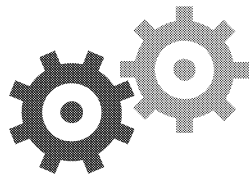


**Existing GCMS  
functionality**



**Key Business Capabilities required  
for the future derived from  
workshops with IRCC staff**

2018 Magic Quadrant



**IT Design Guiding  
Principles derived from  
workshops with IRCC  
staff**

**Capabilities and functionality garnered  
from market leading solutions in  
relevant Gartner Magic Quadrants**

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# The GCMS Future State was informed by IT Design Guiding Principles developed with IRCC staff



## Solution Design Principles

- ✓ Provide consistent customer experiences across all channels
- ✓ Engage customers based on a single consolidated identity record
- ✓ Prefer configuration of software packages over customization
- ✓ Prefer buying COTS solutions over building custom solutions
- ✓ Select industry standard and/or open standard solutions
- ✓ Increase flexibility and agility through more componentized functions and architecture
- ✓ Explore the potential of cloud solutions where possible to mitigate reliance on SSC
- ✓ Address speed/bandwidth/latency by designing components and functionality closer to the edge for users in the field



## Design Lifecycle Principles

- ✓ Design solutions with security in mind from inception
- ✓ Greater focus on supportability, maintainability and scalability by thinking about these dimensions earlier in the design process
- ✓ Design from the user backwards – conduct development more hand in hand with the client groups
- ✓ More continuous and agile development approaches
- ✓ Enable easier and faster roll outs of new functionality – the current release based approach is too constraining
- ✓ Architect to allow easy and broad access to data thereby enabling advanced analytics and AI enhancements
- ✓ Provide flexibility and end-user configurability for common and predictable changes

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# The GCMS Future State was informed by IT Design Guiding Principles developed with IRCC staff

- ✓ Person, not case, as the overriding design principle
- ✓ Information and service provision online (awareness, education, forms, intake, status etc.), that can be localized
- ✓ Digital (electronic files, paperless)
- ✓ Data integrity, data sharing, data integration (where legislatively allowed)
- ✓ Process automation, advanced analytics and machine learning (case assessment, case management, case processing)
- ✓ Dynamic business rules (dynamic routing of applications)
- ✓ Workload and workflow automation and management (capacity and expertise utilization across offices)
- ✓ Real time (data, access, decision making)

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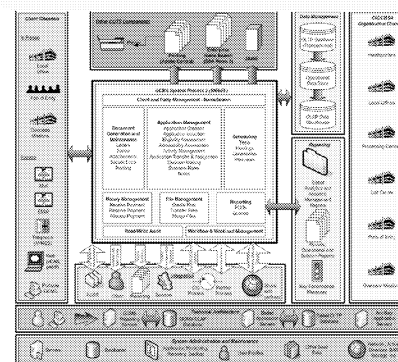
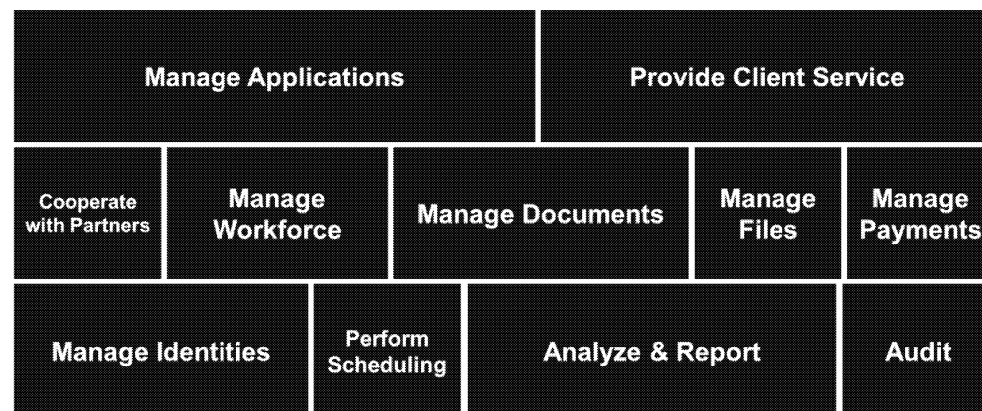
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# GCMS supports a broad set of business capabilities that, in part, enable IRCC to deliver on its core responsibilities

- For the purposes of this report, Gartner considers the scope of GCMS to encompass the set of IRCC business capabilities that the platform *directly* supports.
- The business capabilities supported by GCMS have a direct impact on how IRCC is able to address its three core responsibilities:
  - Visitors, International Students and Temporary Workers
  - Immigrant and Refugee Selection and Integration
  - Citizenship and Passports
- A clear understanding of the current business capabilities facilitates identification of current challenges faced by IRCC as well as opportunities for how GCMS can better support the business.
- Top level business capabilities tend to be stable over time, however significant enhancements and changes in more granular business capabilities point to the need for both business and technology transformations in the future.

## Scope of Business Capabilities Supported by GCMS



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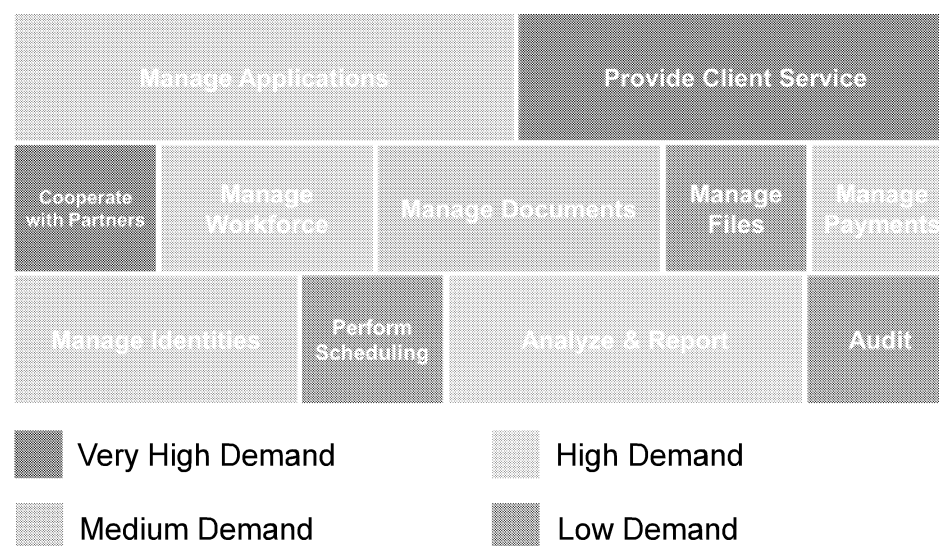
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# There is significant demand from the business to improve and extend the business capabilities supported by GCMS

- There is very high demand from business stakeholders to improve and extend business capabilities that allow IRCC to Provide Client Service and Cooperate with Partners.
  - Areas of focused demand for Providing Client Service include improvements to: client self-service, customer experience, and client engagement.
  - Areas of focused demand for Cooperating with Partners include improvements to: partner process integration and the reliability of support provided to partners (due to the technical condition of GCMS).
- The need for increased automation and digitization accounts for the much of the business demand for capabilities enhancements across: Manage Applications, Manage Workforce and Manage Identities.
- The need for improvements in security and integrity processes drive the demand for additional capabilities that allow IRCC to Manage Identities and Analyze & Report.

## Demand Analysis of GCMS Business Capabilities



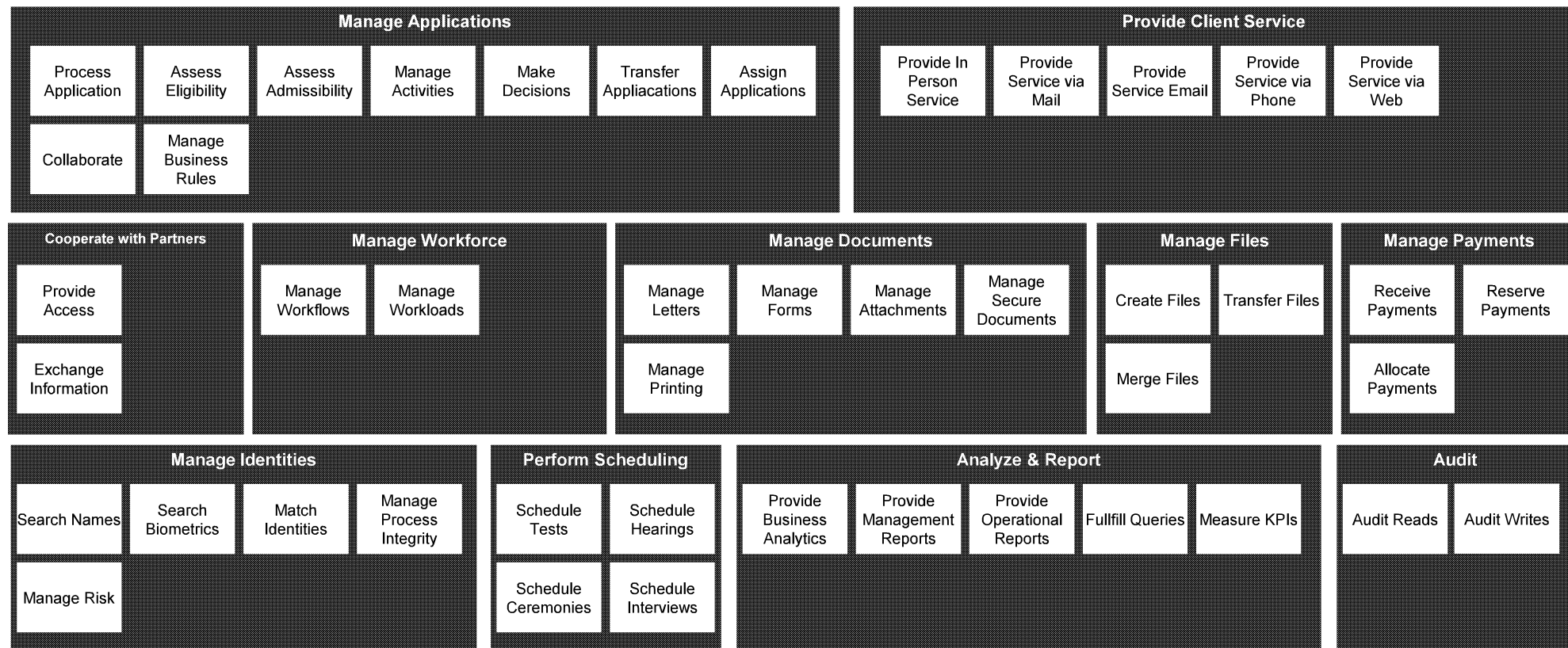
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# GCMS adequately supports the broad set of business capabilities required today...



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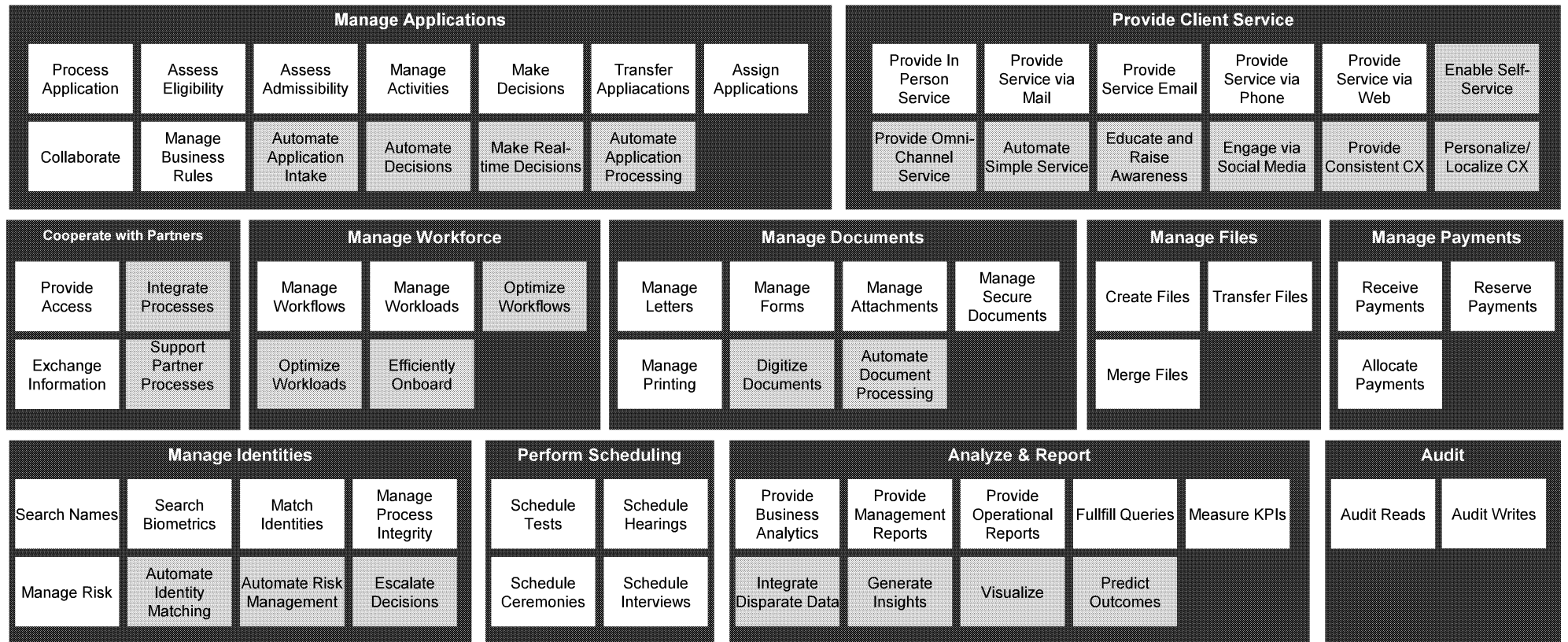
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Current State  
Capability

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# ...However, in the future IRCC will require GCMS to support capabilities that it does not currently have



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Future State Capability

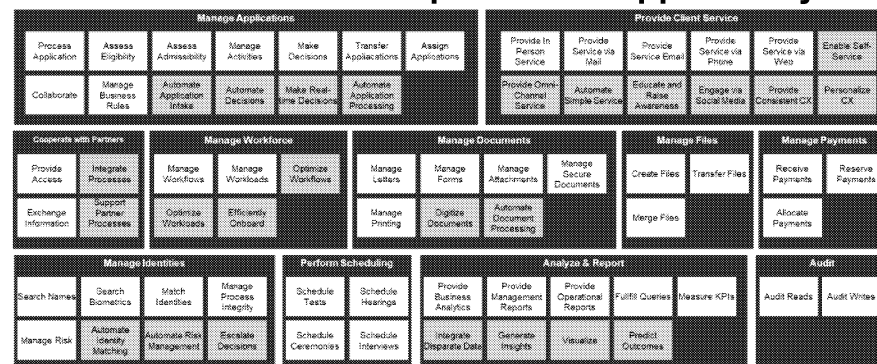
Current State Capability

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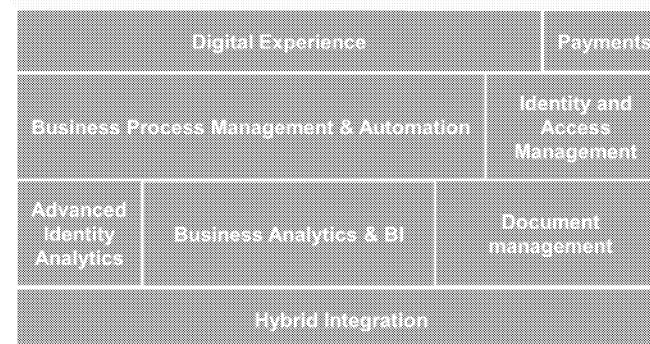
# As IRCC invests to address technical debt, it also should target a future state that enables these capabilities

- Gartner has defined a conceptual model for the future state technology platform based on:
  - Business Capabilities required for the future, derived from workshops with IRCC staff, Gartner Consulting reference models and Gartner Research.
  - Capabilities and functionality garnered from market leading solutions in relevant Gartner Magic Quadrants and broader Gartner research.
  - IT Design Guiding Principles derived from workshops with IRCC staff, informed by Gartner Research industry best practices.

## Future State Business Capabilities Supported by GCMS



## Future State GCMS Technology Platform



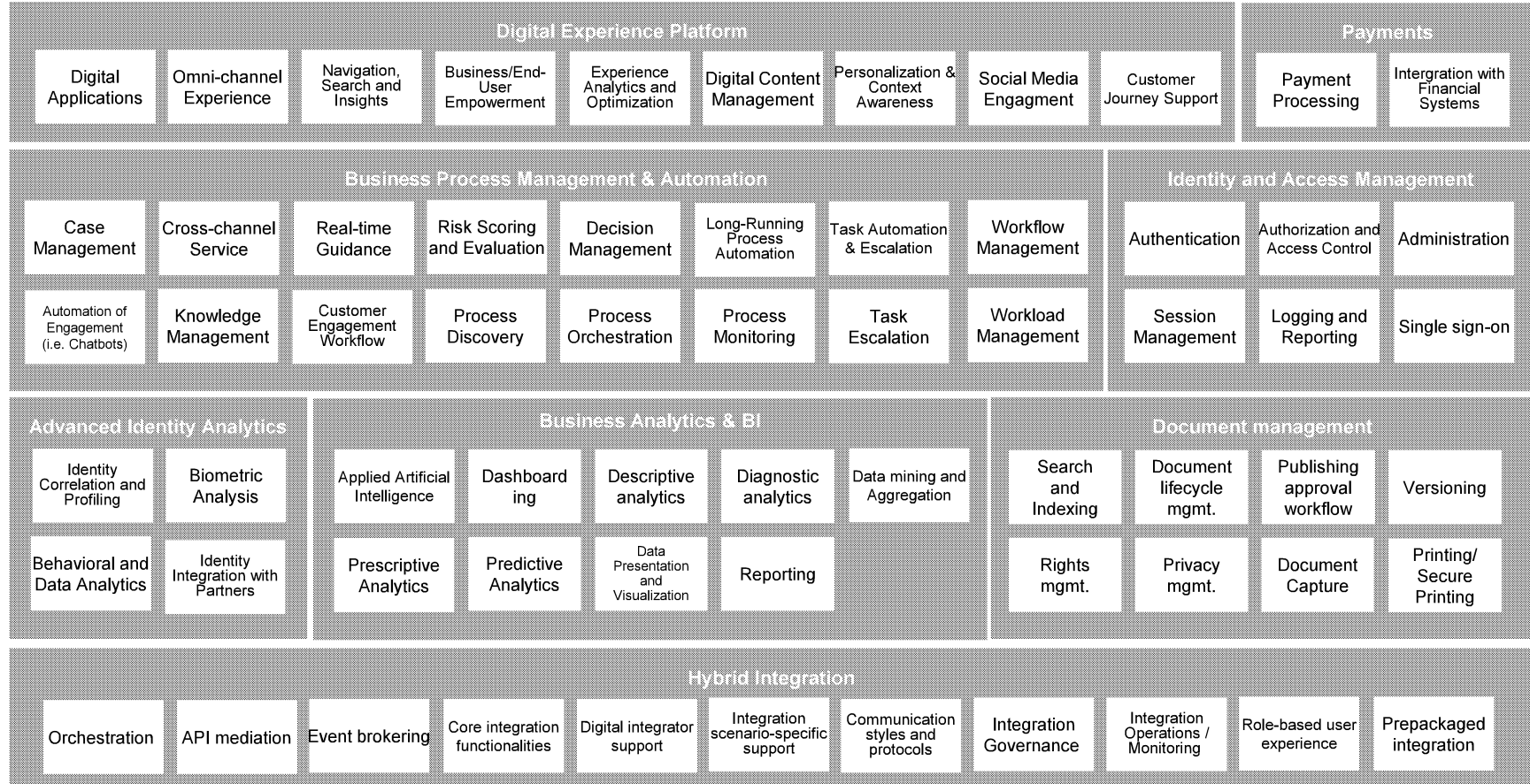
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# GCMS Future State Technology Platform aligned to future capabilities, design principles, and leading solutions



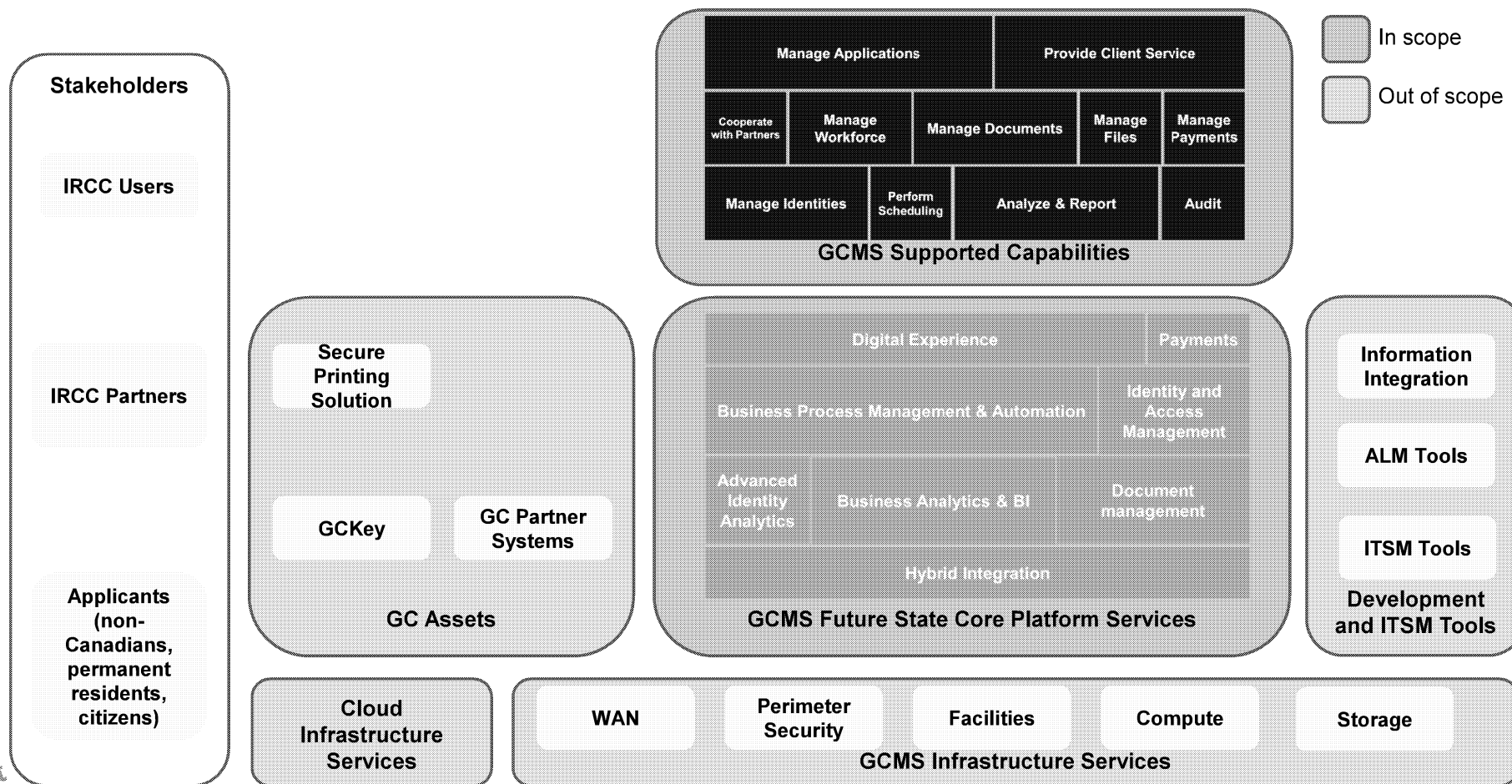
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# The GCMS Future State in the broader IRCC IT Environment



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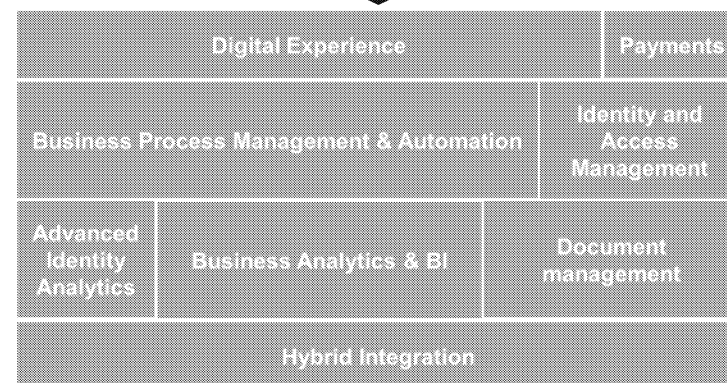
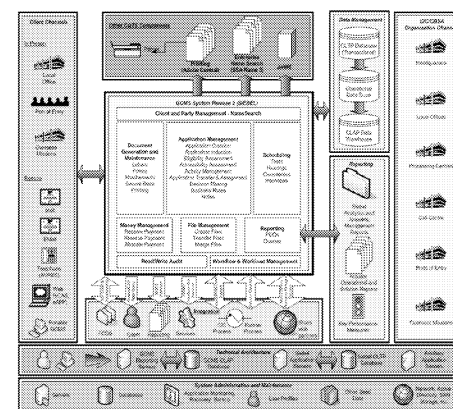


# Gartner recommends a multi-year, 4 step approach to transform GCMS by “Hollowing out the Core”

The multi-year strategy involves isolating the Legacy GCMS solution and then progressively modernizing the solution in stages as follows:

1. Implement a Hybrid Integration Platform and use it to mediate access to Legacy GCMS.
2. Implement a robust Identity and Access Management (IAM) solution followed by a Digital Experience Platform that transitions customer experience away from Legacy GCMS.
3. Implement a Business Process Management & Automation platform that replaces core Legacy GCMS functions, and integrate the new BA & BI solution.
4. Finally, decommission Legacy GCMS.

The next 4 slides outline the approach in detail.



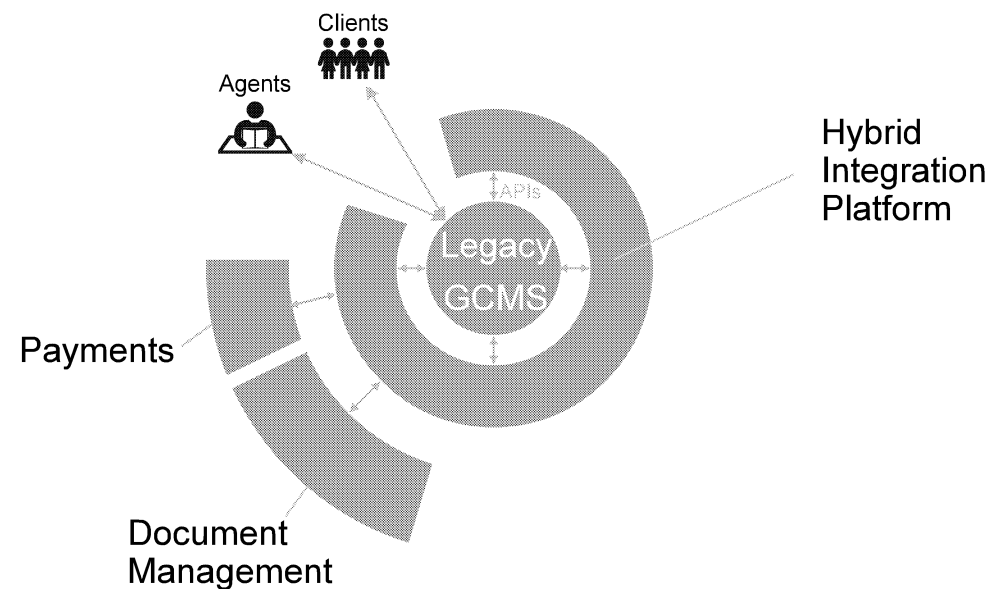
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# 1. Implement a Hybrid Integration Platform (HIP) and use it to mediate access to Legacy GCMS

- A hybrid integration platform (HIP) is a framework of on-premises and cloud-based integration and governance capabilities that enables differently skilled personas (integration specialists and non-specialists) to support a wide range of integration use cases.
- IRCC should begin by implementing a HIP to isolate Legacy GCMS through mediation of its integration with other components.
- This will also serve to consolidate the current fragmentation in integration capabilities that are currently present, and problematic, in GCMS.
- IRCC should pilot implementation of the HIP by selecting viable components in good technical condition such as Document Management (GCDocs) and Payments.
- Initially, Agents and Clients would continue accessing Legacy GCMS directly.



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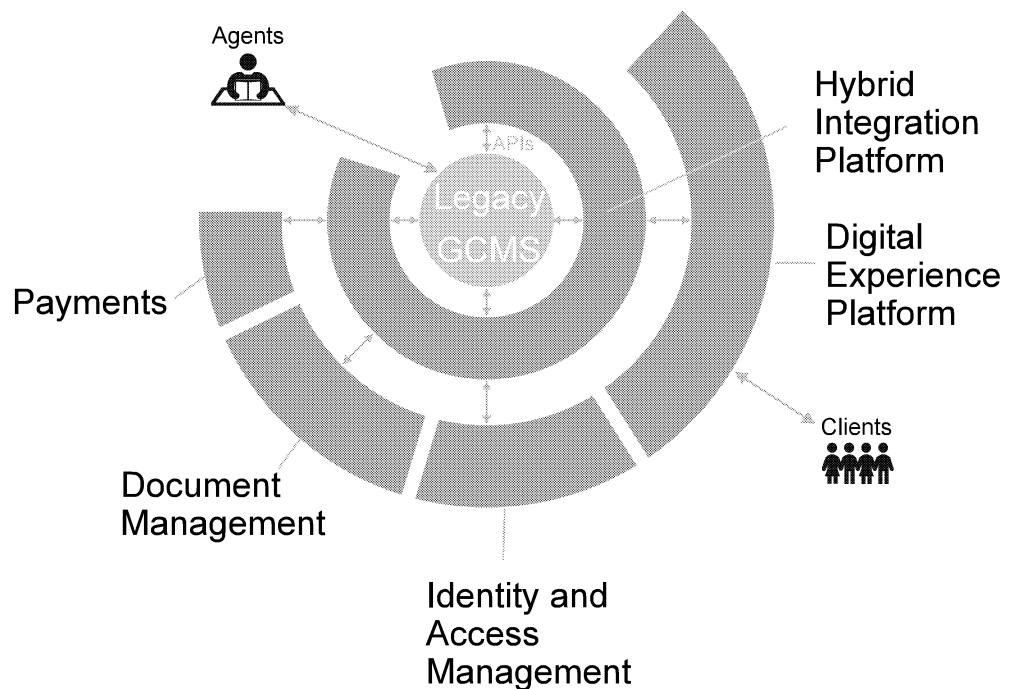
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## 2. Implement a Digital Experience Platform and IAM, and transition customer experience away from Legacy GCMS

- A digital experience platform (DXP) is an integrated set of core technologies that support the composition, management, delivery and optimization of contextualized digital experiences.
- IRCC should next transition all client customer experiences away from Legacy GCMS to the DXP which will enable IRCC to effectively support digital channels and provide cross-channel continuity across the entire customer journey.
- IRCC should implement an IAM solution in tandem with the DXP initiative to effectively manage identities and access across the workforce, partners, and customers, and to improve IRCC capabilities related to managing risk and reducing fraud.



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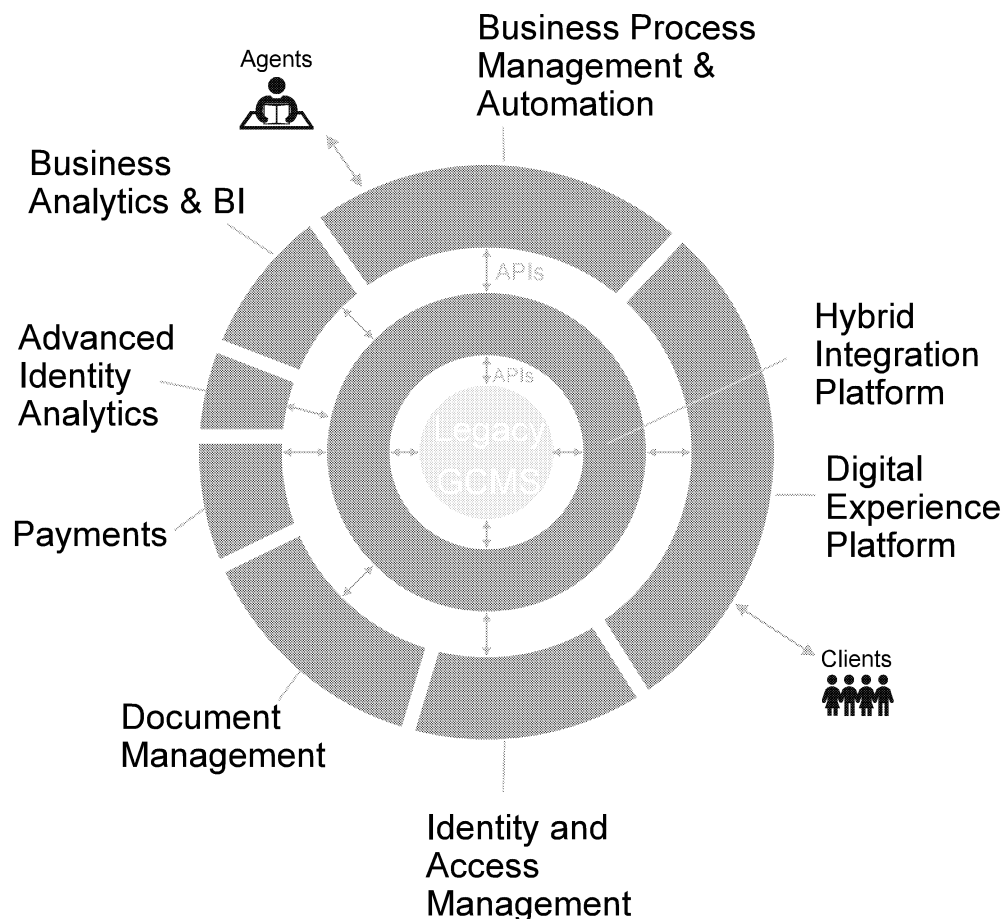
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### 3. Implement a BPM & Automation platform that replaces core Legacy GCMS functions

- There are multiple types of solutions that cover BPM & Automation, the solutions most relevant to the needs of IRCC include: Customer Engagement Centers, Intelligent Business Process Management Suites and Robotic Process Automation.
- IRCC will need to select a combination of these solutions to replace Legacy GCMS (and Siebel) capabilities.
- Gartner recommends that the target state technology platforms are implemented incrementally and Legacy GCMS is phased out in tandem.
- IRCC will also need to integrate the new/renovated BA & BI solution and solutions providing Advanced Identity Analytics.



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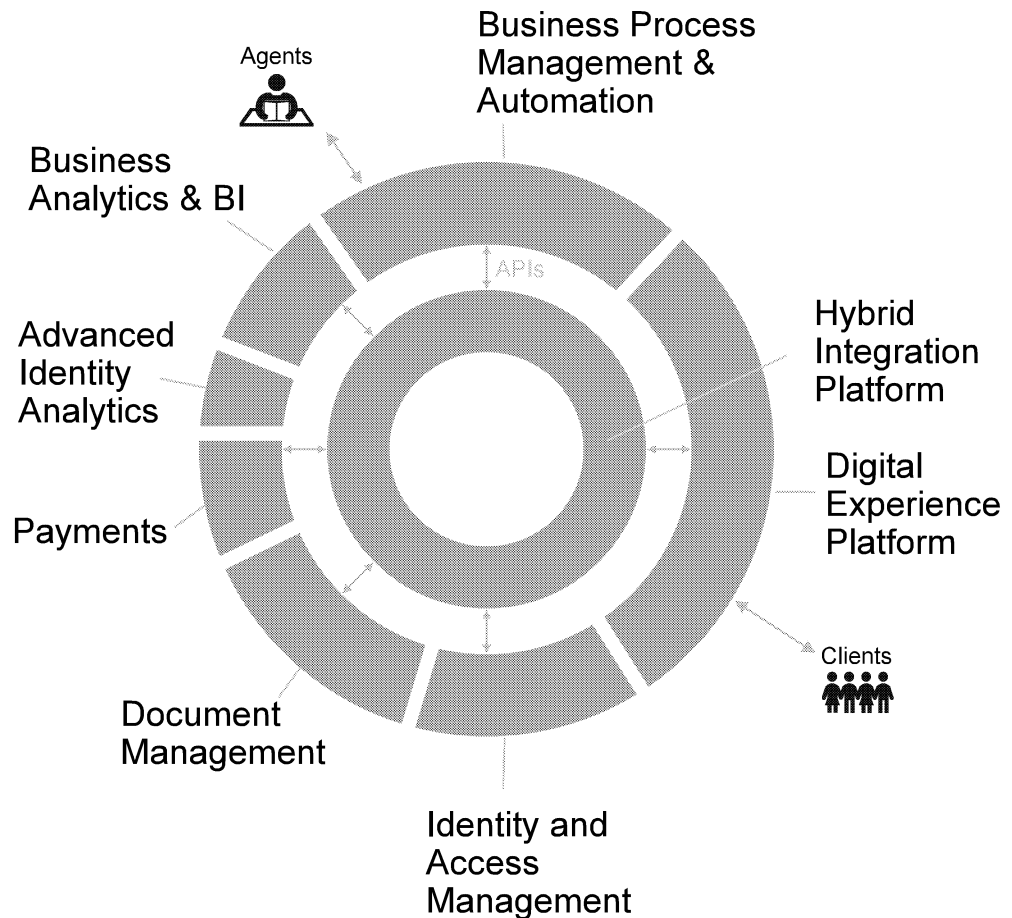
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## 4. Decommission Legacy GCMS

- Once all major functions and capabilities are migrated away from Legacy GCMS, onto the future platform, IRCC will need to decommission Legacy GCMS.
- Key decommissioning activities include:
  - Establish sponsorship and funding for a formal project to Decommission Legacy GCMS
  - Plan the retirement of GCMS and ensure that business dependencies are verified, technical and legal reviews are complete, detailed plans for the shutdown are developed and the process is reversible.
  - Execute the retirement plan based on a detailed plan for the shutdown, monitor progress throughout the planned phases and ultimately remove the GCMS infrastructure and costs, preserving only the data.



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# Start Slow to Work Fast

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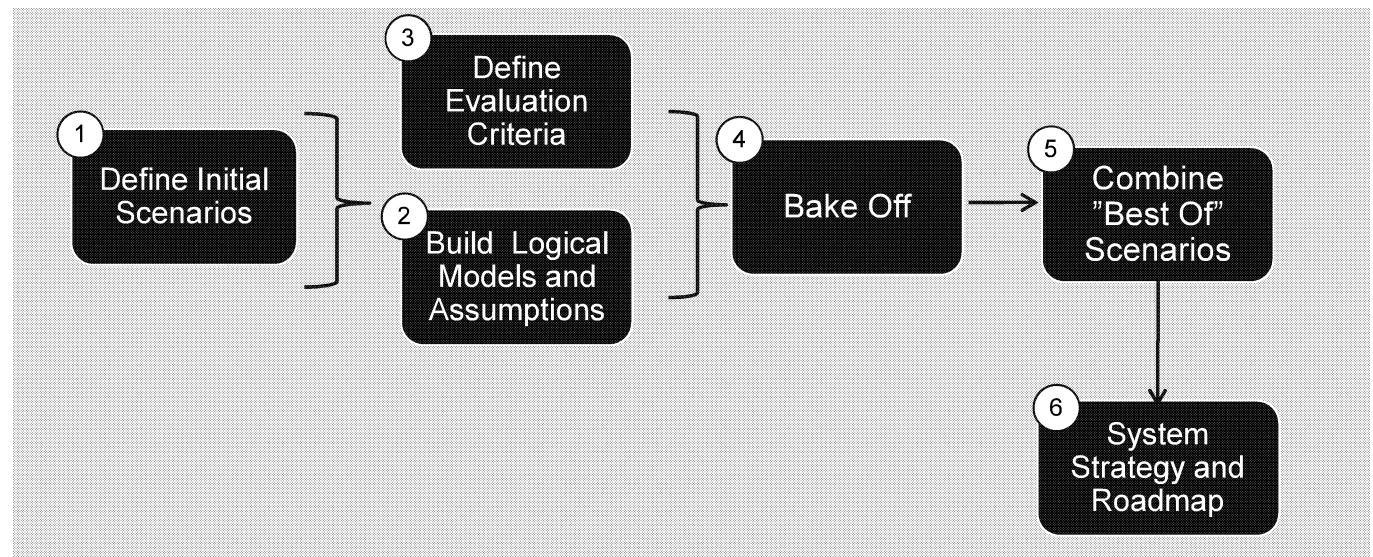
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# Rigorous Approaches to Large Scale System Transformation – A Simple Process Template

- There is significant money at stake, often systems are mission critical, and the future state can be achieved several ways...assess possible scenarios
- Even if outside the realm of possibility, scenario analysis is a useful way to ensure the ultimate approach has considered all avenues and understood implications



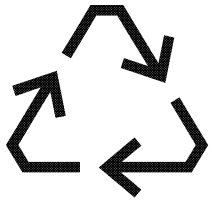
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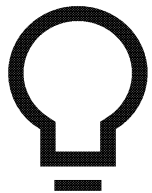
# Scenario Development and Analysis Critical Concepts



- There is never a single perfect solution, it's about understanding the trade offs
- Scenarios are not final solutions
- Use multiple evaluation models - they all lead to the same place
- Link business capabilities to the IT capabilities needed to support them
- Use architecture descriptions consistently for all scenarios



- Quality Assurance gets more complex
- Evidenced based monitoring increases trust
- Doughnut wrapping patterns for legacy systems



- Artificial Intelligent (AI) and Robotic Process Automation (RPA) is changing the landscape: identify opportunities and plumb it early
- Abstraction of processes is back
- Application Performance Management (APM) can be predictive

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# Prerequisites: Scenario Evaluation Frameworks

## TVO Area

**Foundational**  
Flexibility  
Extensibility  
Scalability  
Reliability  
Availability  
Required Capacity  
Required Performance Upgrade (operational)  
Infrastructure Compatibility  
Security and Privacy  
Serviceability

Solution Options Analysis  
*Option 3: One New Solution*

Criteria	Rating	Pro
<b>Leverage DOT IT assets where possible</b>	⬇️	• N/A – no ITT assets will be leveraged • Option entails procure DOT today
<b>Cost Implications</b>	⚙️	• Implementation costs go down as number of integrations are reduced • Solutions will likely re
<b>Expected Duration</b>	⬆️	• Solutions will likely be SaaS, reducing time to implement • 1 solution will reduce integration complexity • N/A
<b>Implementation Network</b>	⬆️	• The majority of work order mgmt. vendors offer implementation services • Some of the solutions have a partner network • N/A
<b>Business Alignment</b>	⬆️	• TPM can procure 1 solution to support TPM business needs • New features will consistently be deployed • Customization more difficult with a SaaS solution
<b>Hosting Model</b>	⚙️	• Some solutions offer on-premises deployments • Majority of these solutions are cloud-based

Category	Definition	Score	Smart Build Notes	Score	#5. Independent COTS Notes	Score	#7. Comprehensive COTS (extended business tax platform) Notes
<b>Fit for Strategic Initiatives</b>							
Ensure Continued Stability and Consistency of Tax Revenue Collection and Management		1	Most disruptive scenario to the business stability	4	More stable deployment approach due to lower level of implementation complexity and dependency Due to vendor technology roadmap there is more chance of technology refresh compared to build scenario (i.e. security patches, upgrade to current version of OS)	3	Due to vendor technology roadmap there is more chance of technology refresh compared to build scenario Due to more mature platform in business tax vendors technology roadmap will evolve at faster pace
Reduce Risk of Outdated Technology and Loss of Experienced Staff		1	Unclear technology and skillset roadmap for longer term. More reliance on in-house IT knowledge and skill set, which is more difficult to refresh. Compared to COTS solution training and documentation will need to continue to be developed and updated in house.	3	As property tax vendors are generally smaller and newer in the market, technology roadmap may evolve at a slower pace compared to the extended business COTS scenario. More difficult to find specific skill set than the ones from larger business tax vendor	3	More chance to acquire skill sets from the market due to the maturity and market breadth of the product and vendor in business tax COTS (especially for bigger vendor).

Not directly related to business tax platform

## Operational Support and TCO Goal Enablement

Infrastructure Compatibility  
Security and Privacy  
Serviceability  
Platform Standardization  
Vendor Standardization  
Application Standardization  
System Consolidation  
IT Process Cost Reduction  
IT Process Speed Increase  
IT/IS Staff Productivity  
IT Process Standardization

## TVO Area

**Direct Business Enhancement**  
Business Process Cost Reduction  
Business Process Speed Increase  
Business User Productivity  
Functional Enhancement  
Required Business Process Redesign  
Adherence Business or Regulatory Standards

**Knowledge and Information Management**  
Increased Access  
Increased Information Accuracy  
Increased Information Timeliness  
Increased Information Navigation and Synthesis  
Increased Sharing and Collaboration  
Profile and Personalize

All frameworks lead to the same place: **Cost, Risk, Alignment**

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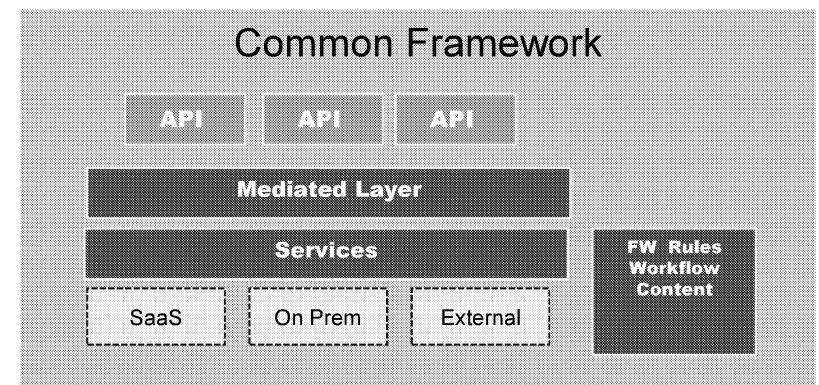
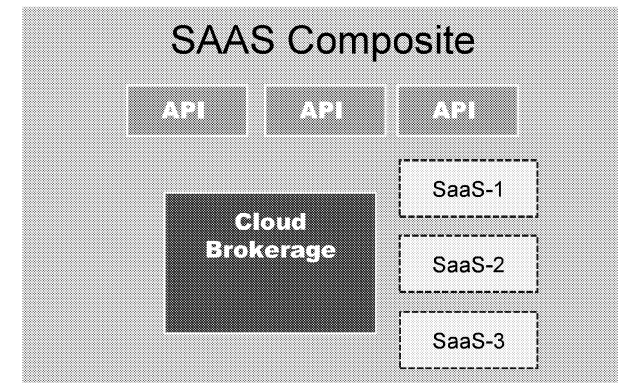
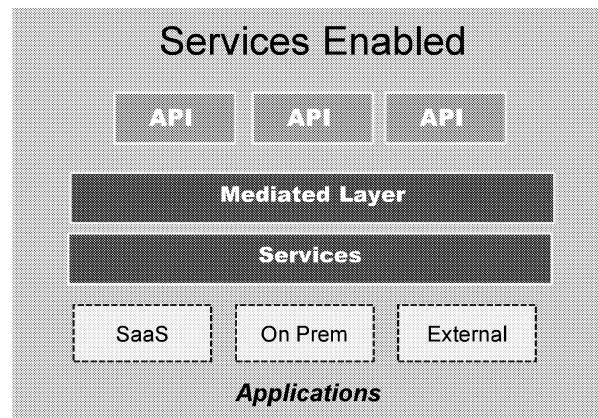
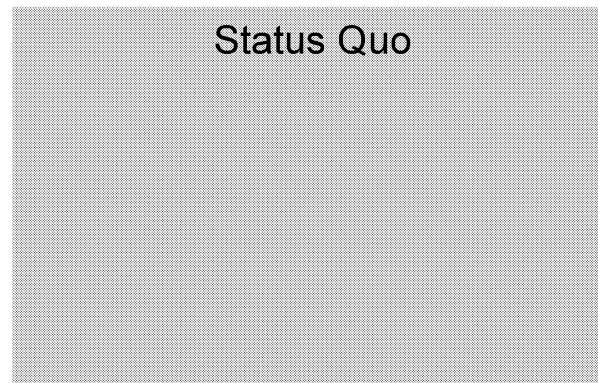
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# GCMS Starter Scenarios

- Proper scenario analysis begins a full understanding of the status quo option, including such elements as ongoing support costs
- Only then can the functional and non-functional and cost benefits of potential future scenarios be truly evaluated
- Gartner has provided strictly hypothetical scenarios for IRCC to consider here



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# GCMS Renewal Program Overview

- The GCMS Renewal Strategic Roadmap outlines the initiatives required for IRCC to proactively manage and deliver the necessary changes to practices, processes, technologies and roles and responsibilities in order to achieve their transformation objectives.
- This plan outlines the required initiatives that are prioritized into Foundational, Strategic Readiness, Core Technology Solutions and Optimize groups to ensure the right focus on immediate and long term priorities.
- To effectively drive execution of the planned initiatives, formalized planning and continued communication from a dedicated GCMS Renewal Team will be required. This requires a dedicated Program team (in other OGDs such as Canada Border Services Agency, teams have been created with VP level leadership and single accountability).
- Since the primary focus for IRCC has been not just replacing the core system, but transforming operations, this plan was developed:
  - To ensure uninterrupted and efficient service delivery through a Legacy GCMS isolation strategy
  - To balance the workload so as not to overload current operations and IT
  - To demonstrate early progress to the Department and to external users through an early stage focus on citizen facing journeys

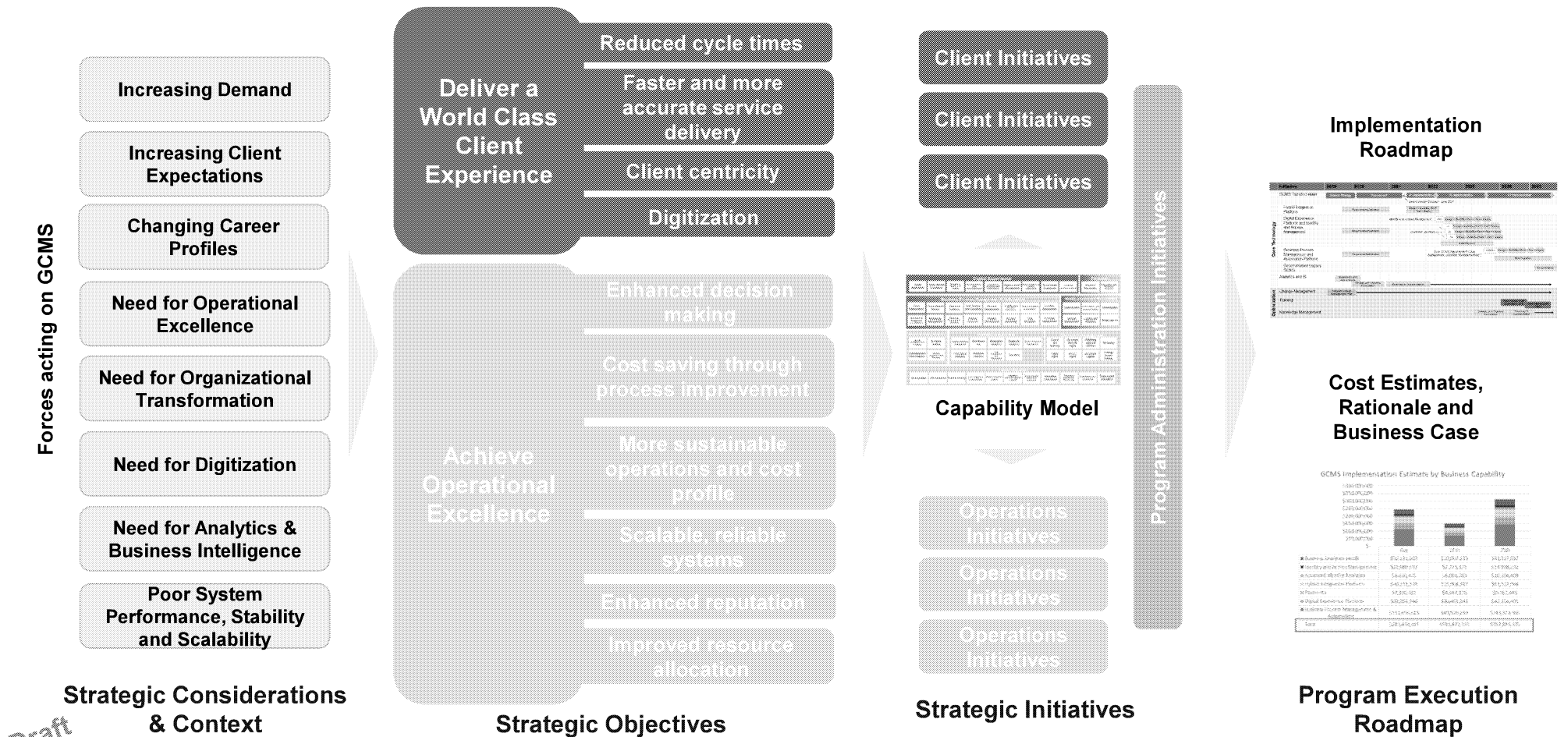
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# Logic Flow for GCMS Renewal Development



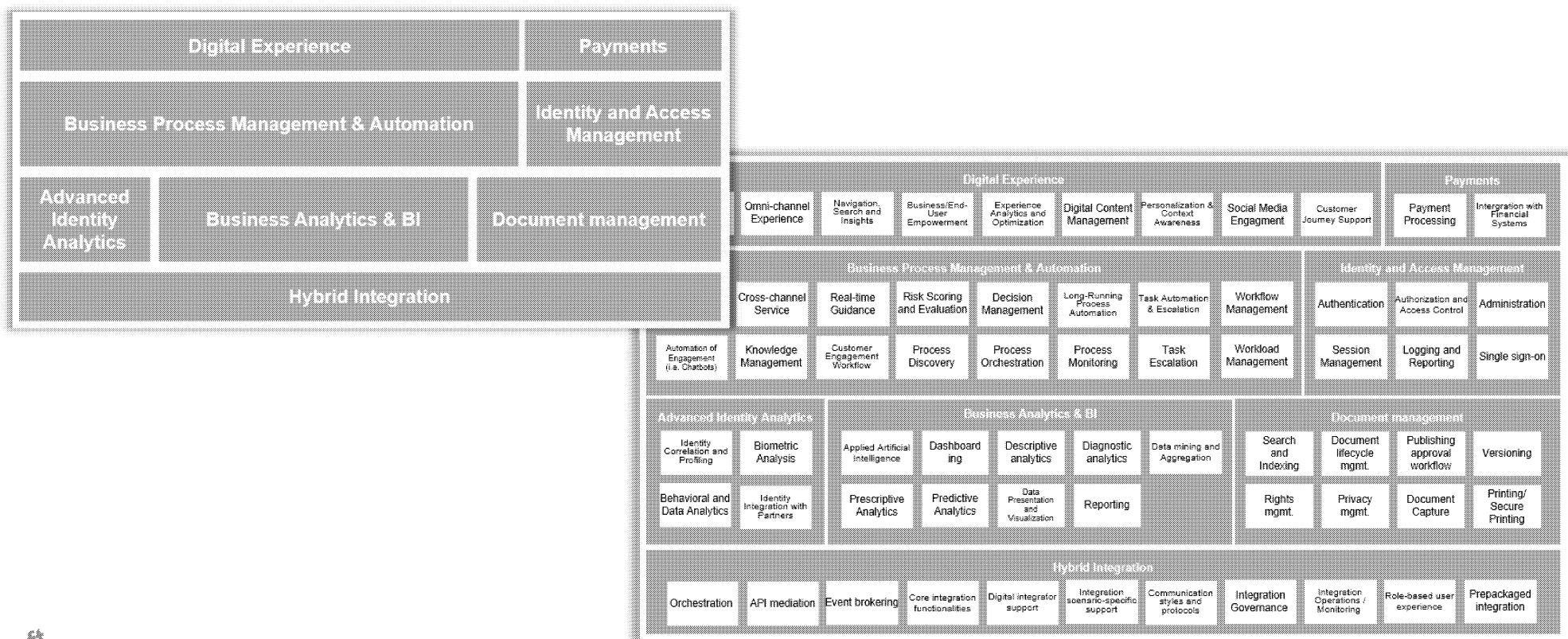
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# The GCMS Renewal Approach is Depicted in the Technology Platform introduced previously



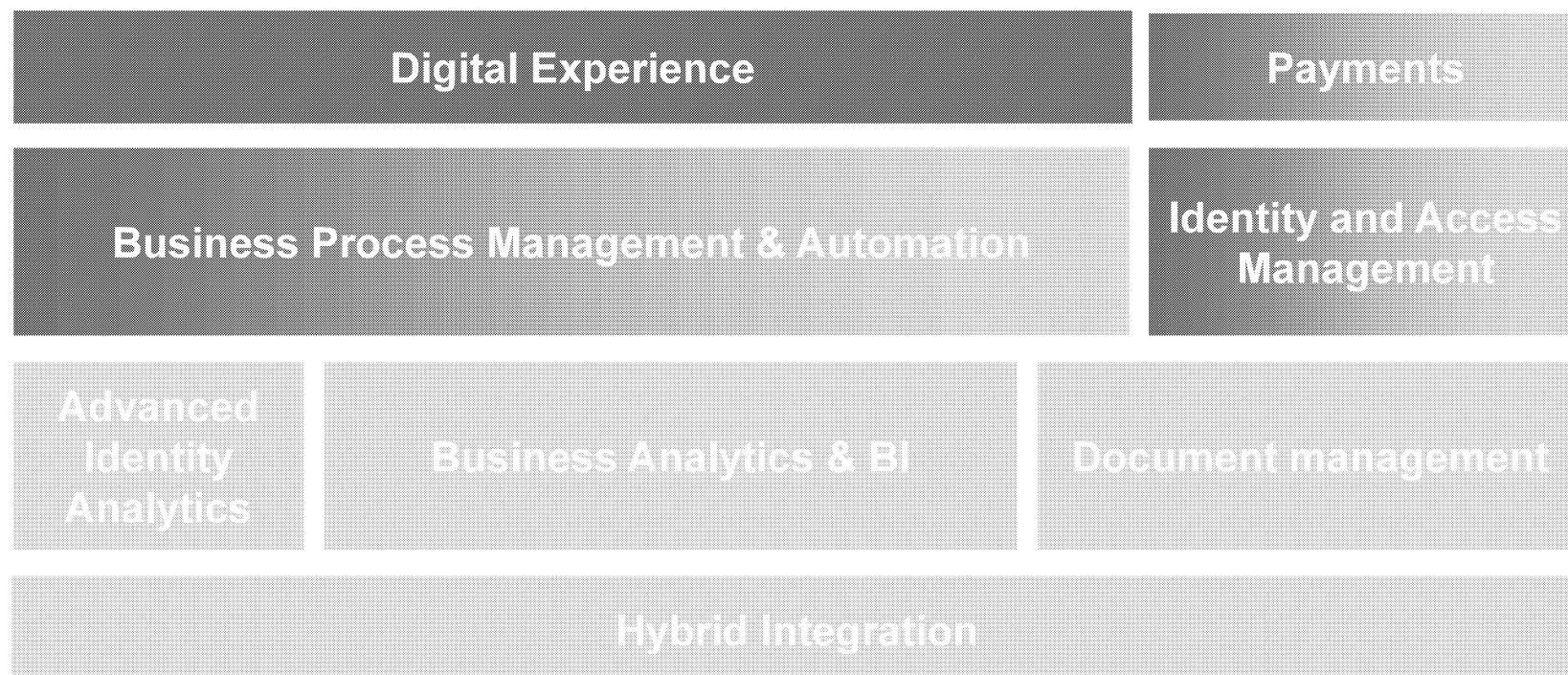
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# Different Components of the GCMS Technology Platform Align to Client and Operational Strategic Objectives



= Deliver a World Class Client Experience



= Achieve Operational Excellence



= Combination

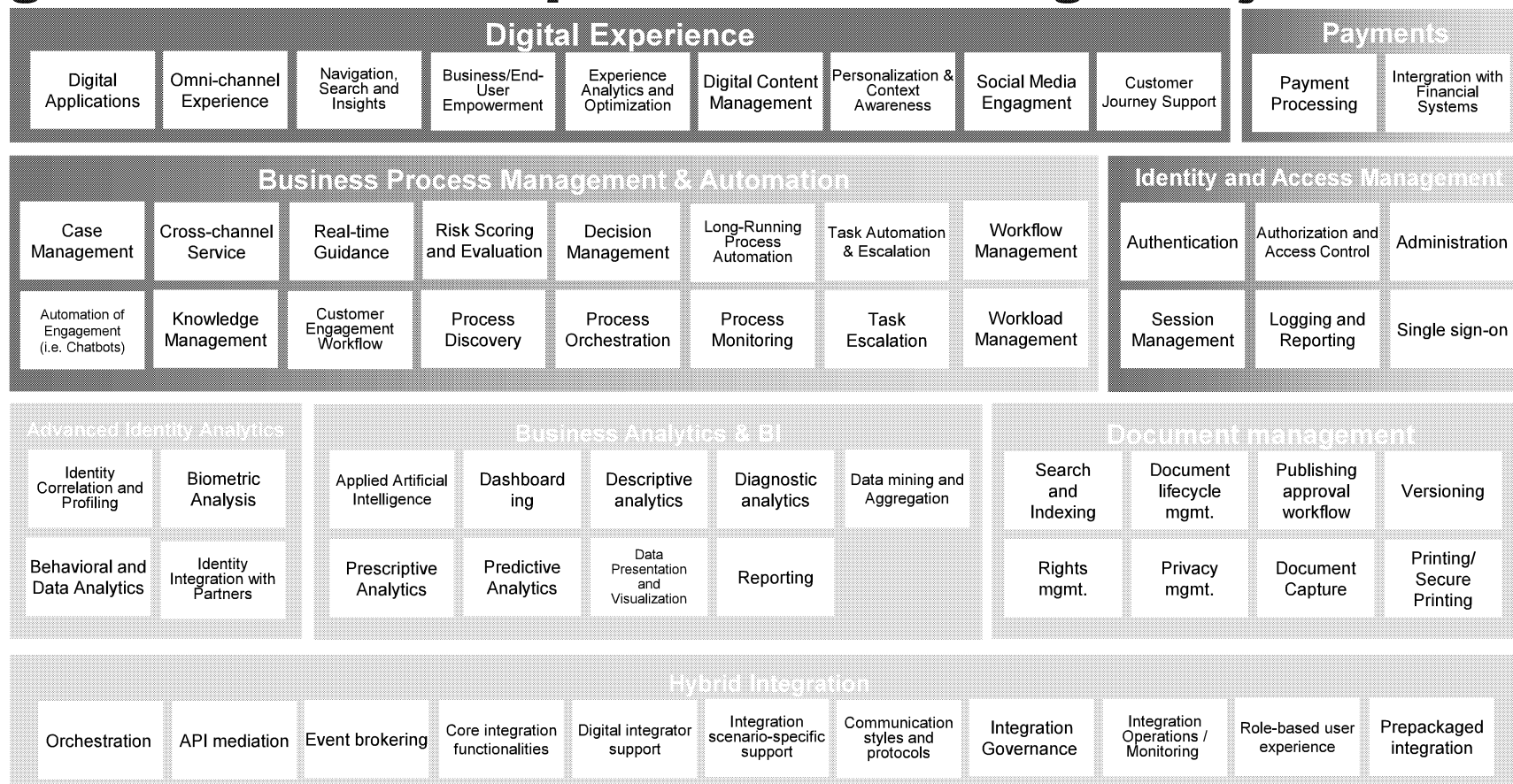
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# Different Components of the GCMS Technology Platform Align to Client and Operational Strategic Objectives



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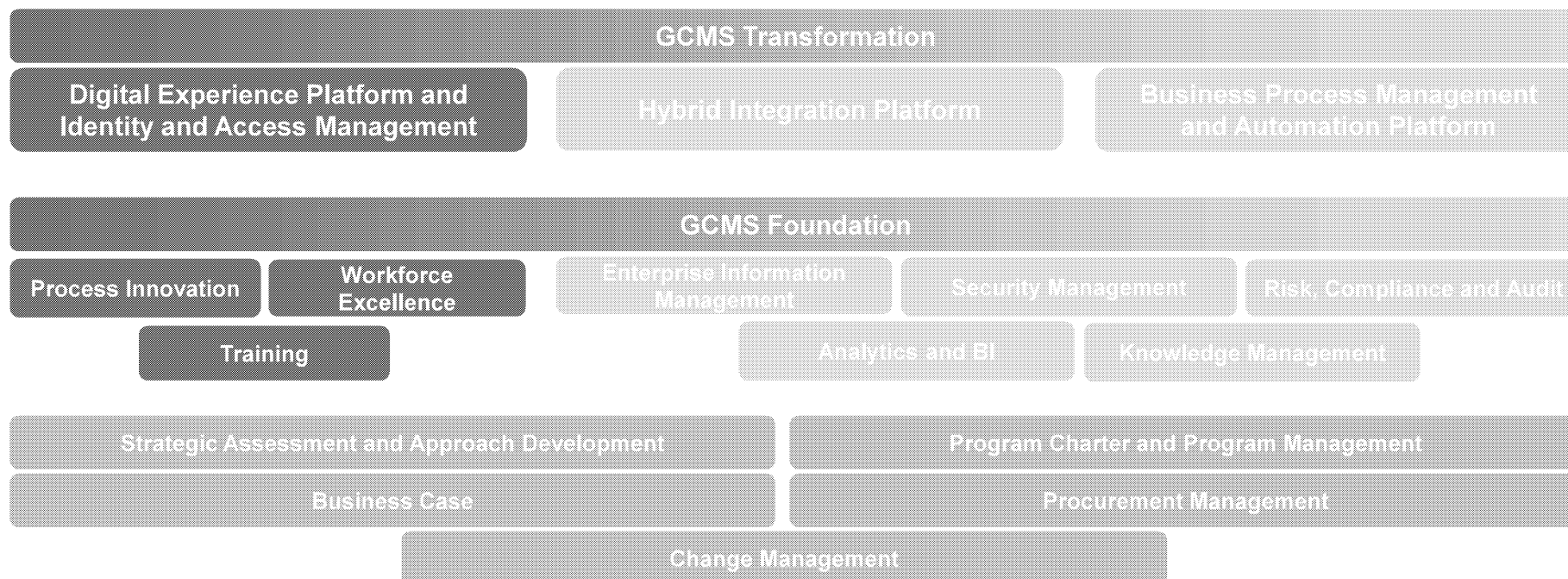
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# GCMS Renewal Component Initiatives by Strategic Objective



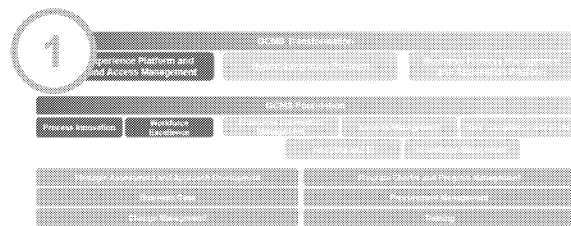
Draft  = Deliver a World Class Client Experience  
  = Achieve Operational Excellence  
  = Combination  
  = Preparation and Support

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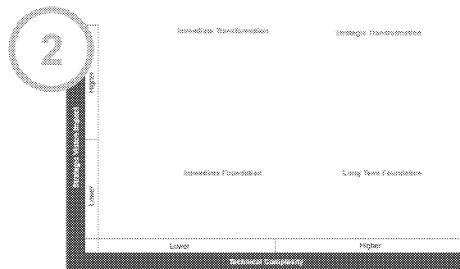
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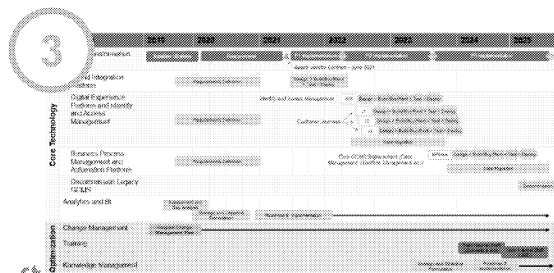
# GCMS Renewal Component Initiatives - Implementation Analysis



1. In order to understand how GCMS Renewal Strategic Initiatives should be prioritized and sequenced Gartner assessed each initiative in regards to Strategic Impact and Technical Complexity



2. By mapping the initiatives on these two axes Gartner developed an analytical map that categorized the initiatives around four quadrants based on:
  - Implied timeframe - immediate vs. long term or strategic
  - Character of the initiative – foundation / transformative



3. This analysis provided important insight into the final step of translating the grouped and sequenced initiatives into a detailed implementation roadmap

Within these areas, it was also possible to identify groups of common initiatives across strategic objectives and these groups provided the basis for creating a roadmap as well as organizes the initiatives into a plan of logically grouped and sequenced activities.

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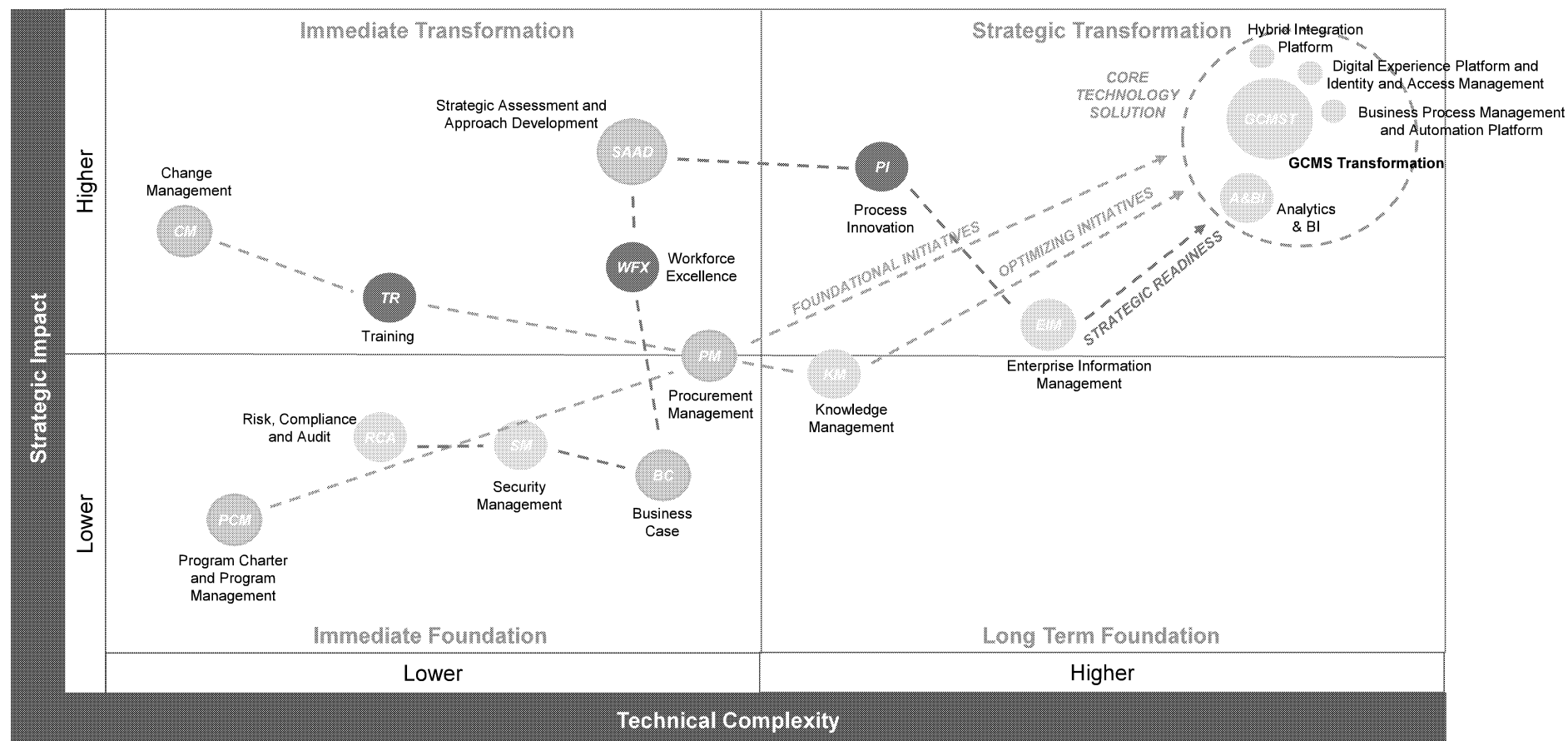
# GCMS Renewal Component Initiatives - Implementation Group Definitions

Gartner identified similarities and dependencies between initiatives and developed groups based on their priority and sequencing. Initiatives are colour coded into the groups outlined in the table below and displayed in the Strategic Implementation Analysis Map on the next slide.

Initiative Group	Initiatives	Definition
<b>Foundational Initiatives</b>	<ul style="list-style-type: none"> <li>Program Charter and Program Management (PCM)</li> <li>Procurement Management (PM)</li> </ul>	Initiatives to support the overall management of the GCMS Renewal program. These initiatives are connected by a yellow dashed line on the implementation analysis map that follows.
<b>Strategic Readiness Initiatives</b>	<ul style="list-style-type: none"> <li>Strategic Assessment and Approach Development (SAAD)</li> <li>Business Case (BC)</li> <li>Process Innovation (PI)</li> <li>Enterprise Information Management (EIM)</li> <li>Workforce Excellence (WFX)</li> <li>Security Management (SM)</li> <li>Risk, Compliance and Audit (RCA)</li> </ul>	Initiatives that prepare GCMS business capabilities, operations, technology and risk mitigation needs associated with the deployment of a new strategic technology solution. These initiatives are connected by a dark blue dashed line on the implementation analysis map that follows.
<b>Core Technology Solution Initiatives</b>	<ul style="list-style-type: none"> <li>GCMS Transformation (GCMST)               <ul style="list-style-type: none"> <li>Hybrid Integration Platform</li> <li>Digital Experience Platform and Identity and Access Management</li> <li>Business Process Management and Automation Platform</li> </ul> </li> <li>Analytics and BI (A&amp;BI)</li> </ul>	Initiatives that comprise the future strategic technology solution for GCMS Renewal. These initiatives are connected by an orange dashed line on the implementation analysis map that follows.
<b>Optimizing Initiatives</b>	<ul style="list-style-type: none"> <li>Training (TR)</li> <li>Knowledge Management (KM)</li> <li>Change Management (CM)</li> </ul>	Initiatives that further operationalize and improve the effectiveness of the GCMS Renewal program. These initiatives are connected by a light blue dashed line on the implementation analysis map that follows.

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# GCMS Renewal Component Initiative Analysis Map



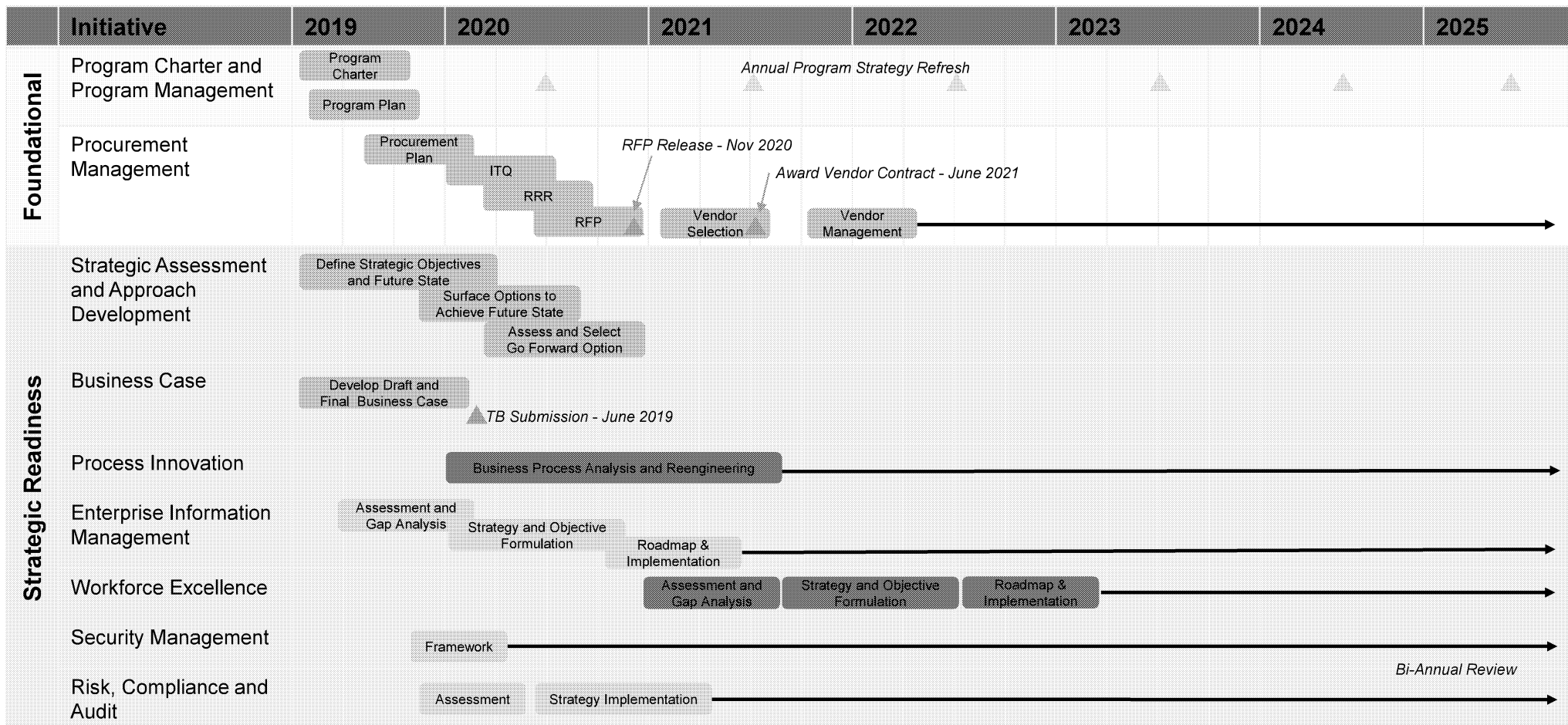
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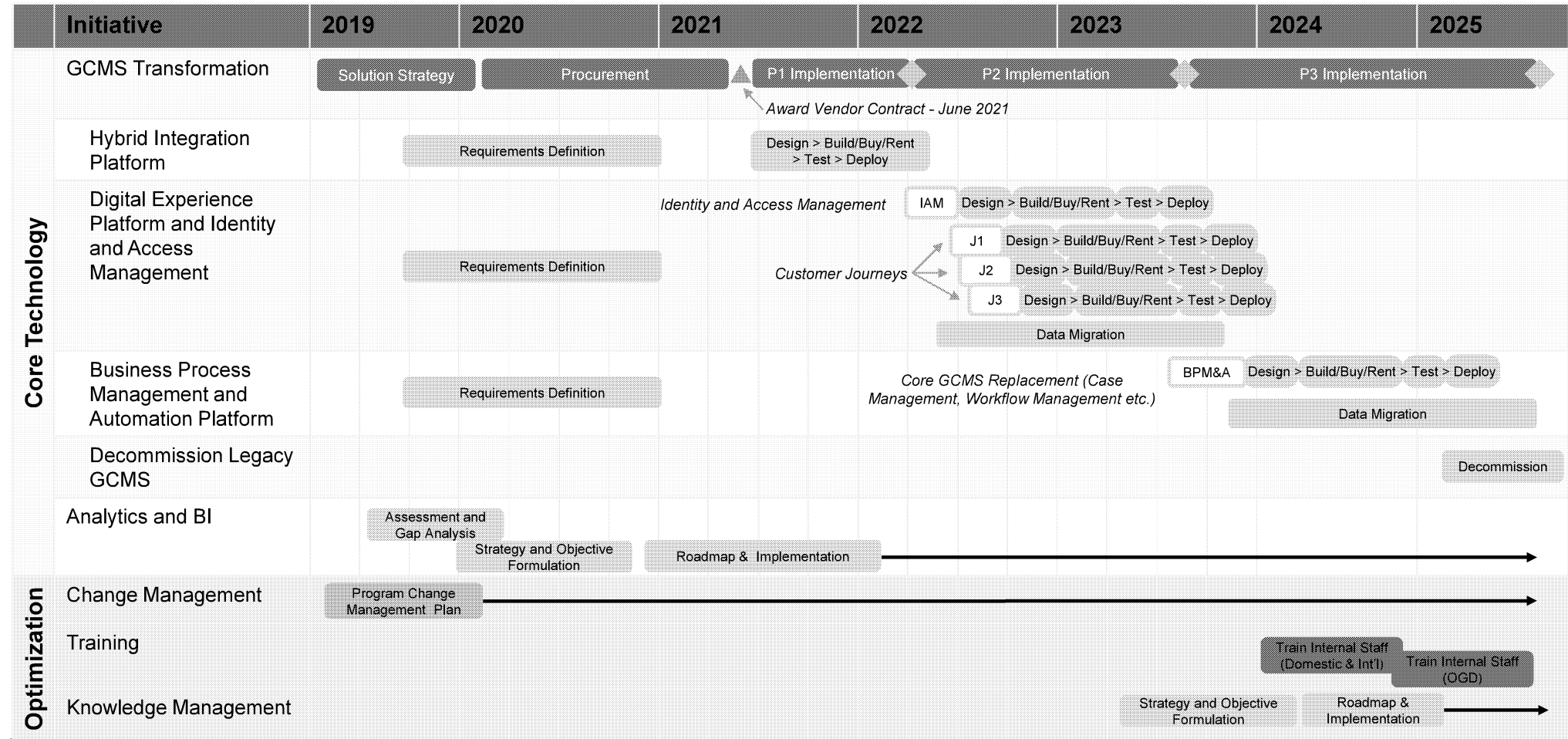
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# GCMS Transformation Program Workplan Roadmap [1 of 2]



# GCMS Transformation Program Workplan Roadmap [2 of 2]



**Legend:**  
 Key Deliverable  
 Project Milestone  
 Ongoing Competency

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# Gartner's Approach to Developing Estimates for the GCMS Renewal Project

- Gartner selected 6 similar Case Management System projects (national Government organizations) that involved implementation of a new system at the national level by an SI with involvement / management by the government
  - Comparisons are based on implementation projects with systems of a similar size as GCMS (~148K function points)
    - GCMS size (function points) was determined through the previous IRCC GCMS benchmark sizing activity in 2018
    - SI organizations provided a vendor solution with minimal customization and relied on configuration as opposed to customization of code
  - Cost estimate covers all phases of implementation, from initial efforts of developing a business case, requirements management, testing through to go live and a 60 day warranty period

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# GCMS Renewal Scope – Functionality Estimate

- The size of GCMS is determined by function point analysis
- GCMS size is estimated at ~148K function points
- The table below displays the distribution of functionality by business capability

Functional Modules	% of Overall Functionality
Business Process Management & Automation	46%
Digital Experience Platform	13%
Payments	3%
Hybrid Integration Platform	16%
Advanced Identity Analytics	3%
Identity and Access Management	5%
Business Analytics and BI	13%

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# GCMS Renewal Estimate – Cost Estimate Assumptions and Impact

Assumption	Impact of any Variance in Assumption
7,100 named users (# of licenses; approximate number of IRCC employees)	High (>20%)
One central production instance with primary support provided in North America	High (>20%)
An SI provides implementation services	High (>20%)
Data conversion requirements are included at a 'medium' level of spend (\$40M) for the average, 25th and 75th level of estimation	High (>20%)
Customization is limited and based on a standard template	High (>20%)
Process maturity was assumed to be average (~2.2 on a Gartner maturity scale of 1-5; see Appendix for definitions)	High (>20%)
Estimated costs include staff, software and hardware (infrastructure)	High (>20%)
Software pricing varies significantly, particularly for companies negotiating without external assistance; Gartner removed all data outliers that were greater than 50% above the average peer price	Medium (5-20%)
Assumed a mix of 70% onshore/30% offshore resources for implementation	Medium (5-20%)
Average level of user training is included (should be adjusted for any significant amount – more than 3 days/user)	Low (<5%)

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## GCMS Renewal Estimate – Cost Estimate

- Cost estimates are provided at the 25<sup>th</sup>, average (50<sup>th</sup>) and 75<sup>th</sup> percentiles
- 
- Principal drivers of cost include maturity of government organization project management processes, data integrity and requirements engineering maturity
- So that IRCC can interpret these estimates, the following provides context for the 25<sup>th</sup>, 50<sup>th</sup> and 75<sup>th</sup> percentiles
  - Those organizations that were above average maturity in these areas were able to deliver the implementation project at the lowest cost quartile
  - Those that were average and below for maturity delivered the project at higher cost

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## **Gartner's Approach to Developing Estimates for GCMS Technical Debt Reduction Project**

- Gartner selected 7 similar Case Management System projects (national Government organizations) that involved a technical debt reduction/transition project which also enabled the organization to transition to a modern Cloud environment architecture
  - Comparisons are based on debt reduction projects with systems of a similar size as GCMS (~148K function points)
    - GCMS size (function points) was determined through the previous IRCC GCMS benchmark sizing activity in 2018
    - Technical debt reduction projects varied from [redacted] of the underlying functionality and included a variety of refactoring and updating of integration activity with the existing portfolio

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# GCMS Technical Debt Reduction Scope – Functionality Estimate by Platform

- The size estimate is determined by function point analysis
- The table to the right displays the distribution of functionality by activity/platform and module

Category	Functional Modules	% of Overall Functionality
<b>Siebel Platform</b>	Client/Party Management	46%
	Application Management	
	Money Management	
	Scheduling	
	Document Management	
	File Management	
	Workload Management	
	Reporting	
	Data Warehouse	
	Audit and Monitoring	
	Gateway	
<b>Integration</b>	eServices	29%
	CBIDS	
	Data Warehouse	
	GCDocs	
	FOSS	
	FRS	
	Name Search	
	Interface Hub - MEL - Integration with External Systems	
	Client Access - Citriz	
<b>eServices</b>	eServices	25%

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# GCMS Technical Debt Reduction Estimate – Refactoring Project size

- Gartner selected 7 similar Case Management System projects (National Government organizations)
  - Percentage of the underlying case management system that was refactored ranged from of the system

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# GCMS Technical Debt Reduction Estimate – Project Cost Estimate

- Assumes average cost of development (National government organizations) per function point
  - Mix of insourced, contractors, consultants and outsourced resources

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# GCMS Technical Debt Reduction Estimate – Project Cost Estimate by Platform

- The graphic to the right provides refactoring project cost estimates by platform
- Cost estimates are provided at the 25<sup>th</sup>, average (50<sup>th</sup>) and 75<sup>th</sup> percentiles
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## Next Steps

- Socialize report and obtain input and feedback from IRCC
- Incorporate revisions as necessary to prepare final report
- Create Executive Briefing presentation
- Make presentations as required

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# Program Charter and Program Management

## Initiative: Program Charter and Program Management

**Description:** The renewal of GCMS is not a project, it is a transformation of a mission critical system that will be a full fledged program. The GCMS Renewal program includes a complex array of initiatives that will need to be managed and orchestrated by a specially created Program Management Office (PMO) in order to ensure effective coordination of initiatives, alignment to program timeframes and adherence to budget constraints. The Program Management initiative will define and organize the overall governance of the GCMS Renewal program, including creating a strong accountability framework for both internal and external stakeholders. The program components should be managed as a portfolio of investments that will need to be reviewed and assessed regularly. This should include the appropriate management tools to support progress reporting, analysis and risk management.

### Key Activities:

- Define a project governance model including program charter and organizational structures (e.g. Executive Governance Board, Program Management Office).
- Define roles and responsibilities across program initiatives that includes all stakeholder groups including relevant other government departments (OGD) such as CBSA, RCMP, Global Affairs etc.
- Create a comprehensive Program Management Plan to address the full portfolio of program initiatives, timelines, risk management, benefits realization, program success measures and budget tracking.
- Implement project management tools as needed to support coordination and tracking of all program initiatives. Ensure that initiatives are on track to meet milestones and delivery plans.
- Create a regular schedule of program- and initiative-level review meetings and program management reporting materials, including those required for Executive reporting.
- Track the progress of initiatives to demonstrate value using an appropriate methodology (e.g. Earned Value Management).
- Measure benefits realization against program success measures, as documented in the Business Case.

### Expected Benefits:

- Provide assurance that program initiatives will be managed against a clear scope, schedule and budget
- Clear roles, responsibilities and accountability
- Transparency for stakeholders on program progress and activities
- Clarity on critical program decision making

### Major Deliverables:

- Program Charter and Governance Model
- Program RACI model, with both internal to IRCC and external stakeholder coverage
- Program reporting materials and schedule
- Program Management Plan
- Regular Program Management Reports

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# Procurement Management

## Initiative: Procurement Management \*

**Description:** Procurement will be a critical component to be executed well, especially if outsourcing or “as a Service” type models are to be pursued. In order to fully realize the transformation ambitions of the GCMS Renewal program, it will be necessary to effectively complete procurements for all solutions and services that will support the program implementation, deployment and maintenance. This will include the acquisition required to meet the selected core technology solution, as well as any adjacent solutions required to deliver the required capabilities for IRCC programs. The procurements will need meet all regulatory and legal requirements, but also be structured and organized to prevent procedural delays or impediments for the overall program. Gartner anticipates the requirement for a robust Vendor Management Office (VMO) to manage the vendors of the solutions and/or services.

### Key Activities:

- Create a GCMS Renewal Vendor Management Organization (VMO) to manage vendor relationships and communications, establish vendor governance, maximize value from vendor engagements, track vendor performance and risk, manage contracts, and liaise about vendor activities with the PMO, key stakeholders and the organization as a whole.
- Develop a sourcing strategy that aligns with GCMS Renewal program goals and strategic objectives, including a comprehensive procurement plan, appropriate procurement or contract vehicles, vendor evaluation models and vendor performance metrics.
- Include vendor performance metrics that are aligned to program goals in vendor solicitations.
- Conduct sourcing activities, including identifying vendors, hosting industry days, issuing solicitations, establishing selection criteria, evaluation and scoring vendors, conducting proof of concept exercises (if appropriate), and engaging in contract negotiations as needed.
- Work with IRCC and PSPC legal team to expedite contract negotiations, agreement and execution to support program goals.

### Expected Benefits:

- Maximize business value of vendor relationships
- Formalize vendor evaluation and performance measures
- Improve transparency of vendor performance and overall program success by improving communications between the PMO, program stakeholders, vendors and the organization as a whole
- Efficient procurements in support of the program
- Full compliance with all procurement rules and regulations

### Major Deliverables:

- Program Sourcing Strategy and Timetable
- Vendor Evaluation Model
- Vendor Solicitations
- Required Contract Vehicles

**Draft** \* This activity integrates with the GCMS Transformation activity

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# Change Management

## Initiative: Program Change Management

**Description:** When a core system is being changed Organizational Change Management (OCM) is important. GCMS Renewal is more than that – it is service transformation. OCM will be critical to ensuring the overall success of the transformation program. There will be a significant technological impact of the GCMS Renewal initiatives but there will be an even greater cultural and organizational transformation that will come along with the technology. In order to ensure that IRCC is prepared for all of the changes that the overall program will bring there should be a comprehensive OCM program to accompany and support GCMS Renewal in awareness building, stakeholder engagement and buy-in of solution end users, as well as other government departments.

### Key Activities:

- Establish a GCMS Renewal Program Change Management team to oversee all change management activities.
- Create program Change Management Plan to incorporate all aspects of OCM including program branding, communications and messaging plan to espouse the benefits, a communication plan and channels, timings and stakeholder management.
- Identify Program Change Management “champions” to spread awareness of program benefits.
- Regularly evaluate change management plan and implementation effectiveness.

### Expected Benefits:

- Successful program implementation with stakeholder buy-in and high end user satisfaction ratings
- Mitigate end user and stakeholder resistance to change
- Maximize the effectiveness of technology deployment

### Major Deliverables:

- GCMS Renewal Program Change Management Plan
- Internal and External Communications Plan

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# Strategic Assessment and Approach Development

## Initiative: Strategic Assessment and Development Approach

**Description:** Moving from system replacement to strategic transformation raises the stakes. Rather than just taking advantage of automation or more advanced technology, transformation is an opportunity for step function improvement. This level of thinking requires a true strategic approach powered by outside in thinking and pushing past traditional boundaries. The process begins with a strong understanding of the challenges with the current state, a reasonably detailed articulation of the requirements of the business for the future state and strategic goals/objectives. There will be more than one option to achieve the transformation to the future state. It will be important to first understand the potential options, and then evaluate them.

### Key Activities:

- Define the scope of the GCMS Renewal Program.
- Conduct a thorough analysis of the current state to establish clarity on the major challenges the solution must solve.
- Work with all relevant program areas of IRCC and key external OGDs to develop a clear sense of future state business requirements.
- Work with the IRCC leaders to determine the Strategic Goals and Objectives that will anchor the transformation.
- Through various techniques, define the future state for GCMS Renewal and use this strawman to produce agreement and consensus on major functionality.
- Define business model and service delivery options to obtain the solution.
- Assess and evaluate options to select the go forward option.

### Expected Benefits:

- Clarity of program scope
- Clear purpose on the problems being solved
- Clarity on program goals / objectives
- Clarity on ultimate solution definition, capabilities and functionality
- Value for money and implementation success through option analysis

### Major Deliverables:

- Definition of GCMS Renewal Program Scope
- Current State Analysis, including Case for Change
- Options
- Options Analysis Framework
- Recommended Option

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# Business Case

Initiative: Business Case	
<p><b>Description:</b> When a core system is being changed Organizational Change Management (OCM) is important. GCMS Renewal is more than that – it is service transformation. OCM will be critical to ensuring the overall success of the transformation program. There will be a significant technological impact of the GCMS Renewal initiatives but there will be an even greater cultural and organizational transformation that will come along with the technology. In order to ensure that IRCC is prepared for all of the changes that the overall program will bring there should be a comprehensive OCM program to accompany and support GCMS Renewal in awareness building, stakeholder engagement and buy-in of solution end users, as well as other government departments.</p>	
<p><b>Key Activities:</b></p> <ul style="list-style-type: none"> <li>■ Establish a GCMS Renewal Program Change Management team to oversee all change management activities.</li> <li>■ Create program Change Management Plan to incorporate all aspects of OCM including program branding, communications and messaging plan to espouse the benefits, a communication plan and channels, timings and stakeholder management.</li> <li>■ Identify Program Change Management “champions” to spread awareness of program benefits.</li> <li>■ Regularly evaluate change management plan and implementation effectiveness.</li> </ul>	<p><b>Expected Benefits:</b></p> <ul style="list-style-type: none"> <li>■ Successful program implementation with stakeholder buy-in and high end user satisfaction ratings</li> <li>■ Mitigate end user and stakeholder resistance to change</li> <li>■ Maximize the effectiveness of technology deployment</li> </ul> <p><b>Major Deliverables:</b></p> <ul style="list-style-type: none"> <li>■ Business Case</li> <li>■ Treasury Board Submission</li> </ul>

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## Process Innovation

Initiative: Process Innovation	Deliver a World Class Client Experience
<p><b>Description:</b> A key part of the transformation has nothing to do with case management or CRM technology, and everything to do with process transformation. IRCC should review every aspect of program area operations to streamline and update processes, workflows and business rules in preparation for a case management, CRM, workflow etc., systems. This effort should include safeguards for all regulatory mandates and a strong focus on enhanced service objectives. This initiative will also analyze data processing in all current forms to ensure a comprehensive future operational technology solution with all the necessary requirements and functional features as well as any non-technical organizational and staffing innovations that may be required.</p>	
<p><b>Key Activities:</b></p> <ul style="list-style-type: none"> <li>Establish core group of operational and client service stakeholders with the authority to think creatively and innovatively about future IRCC business processes, and possess business process re-engineering skills.</li> <li>Analyze all core application intake, eligibility assessment, admissibility assessment, activity and case management, money management, scheduling, file management functions (Temporary Residents, Passport, Work Permits etc.) within the Business Capability Model including manage finances, manage payments, manage medical and disability claims.</li> <li>Create a detailed functional analysis including process map workflows, functional use cases and detailed requirements.</li> <li>Continually identify opportunities for process and data integration, tackling functional gaps and standardizing process and service levels.</li> <li>Prioritize functional innovations to facilitate phased approach to development and deployment, and inform GCMS Renewal.</li> <li>Implement 'quick wins' that can immediately operationalize process innovations.</li> <li>Finalize all process documentation and utilize to define any required technology modernization procurements.</li> </ul>	<p><b>Expected Benefits:</b></p> <ul style="list-style-type: none"> <li>Transformed business processes to optimize workflows and processing.</li> <li>Extensive opportunities to enhance business process efficiency and service levels.</li> <li>Rationalization of business process forms and content to allow for a cost-effective and achievable future technology solution.</li> <li>Greater integration of IRCC processes and data by applying future technology capabilities to business process design.</li> <li>Elimination of unsupported and risky 'shadow IT' processing of critical business and client service processes.</li> <li>Opportunities for staff redeployment to higher value activities.</li> </ul> <p><b>Major Deliverables:</b></p> <ul style="list-style-type: none"> <li>Process Innovation Working Group, Meetings and Charter</li> <li>Process Maps for all major Functions related to GCMS</li> <li>Functional Gap Analysis</li> </ul>

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## Workforce Excellence

Initiative: Workforce Excellence	Deliver a World Class Client Experience
<b>Description:</b> The transformation of GCMS is more than a technology initiative – its success will be closely tied to the organizational changes that take place in conjunction with a new system, including any required changes or upskilling in the IRCC workforce to fully take advantage of new capabilities. A modernized system and processes facilitates staff cross-training because tasks are more standardized and information is more broadly accessible (according to permissions).	
<b>Key Activities:</b> <ul style="list-style-type: none"> <li>Conduct a skills assessment to identify gaps.</li> <li>Implement employee cross-training and standardize training material formats across program areas.</li> <li>Explore employee training programs and ongoing professional development opportunities.</li> <li>Assess onboarding plans for new employees, ensure that onboarding materials are updated with a modernized client services philosophy.</li> <li>Conduct risk assessment to identify staff, including contractors, whose loss would have the greatest impact</li> <li>Identify actions needed to manage transition of expected departure of aging workforce.</li> </ul>	<b>Expected Benefits:</b> <ul style="list-style-type: none"> <li>Cross training breaks down organizational siloes by giving all employees a direct line of sight to the client, thereby helping employees in all functions understand client needs.</li> <li>Training employees in more than one program area produces a more dynamic and multi-skilled workforce, and one that has more redundancy to cover vacations or other absences.</li> <li>Cross training empowers staff with new opportunities and may improve organizational capacity utilization and retention rates.</li> <li>The aforementioned benefits combine to create a workforce better able to serve applicants and improve overall customer service levels.</li> </ul>
	<b>Major Deliverables:</b> <ul style="list-style-type: none"> <li>Workforce Gap Assessment</li> <li>Workforce Risk Assessment and Strategy</li> <li>Employee Cross Training Modules</li> <li>Employee Training Plan</li> </ul>

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# Training

Initiative: Training	Deliver a World Class Client Experience
<b>Description:</b> Training is a key factor for any successful transformation and system implementation. Elements of training include education for IRCC staff on how leverage the new technologies and training to support the organizational and process changes that accompany the implementation of a new system. IRCC will provide specialized end user training programs to both internal IRCC staff in Ottawa, but in the regions and international embassies and missions. For applicant service provision, IRCC will also standardize client support across all communication channels.	
<b>Key Activities:</b> <ul style="list-style-type: none"> <li>■ Develop an end user training program for policy and operations staff to be able to leverage the full capabilities of the GCMS Renewal solution.</li> <li>■ Leverage a standard learning management system (e.g. LMS) for training.</li> <li>■ Develop training materials, including templates and standards, that emphasize applicant/client services.</li> <li>■ Develop a client support manual for IRCC staff across all channels with standardized communications, frequently asked questions and responses.</li> <li>■ Review all client-facing training materials to determine how they can support the use of new interactive tools and how clients will access support channels moving forward.</li> <li>■ Ensure that client services training is an ongoing effort as part of an overall organizational change effort, not only a pre-launch initiative.</li> </ul>	<b>Expected Benefits:</b> <ul style="list-style-type: none"> <li>■ Improve satisfaction among applicants/clients.</li> <li>■ Reduce confusion among applicants/clients.</li> <li>■ Improve service delivery processing times.</li> <li>■ Cost avoidance through better information provision/self-serve, more intuitive processes and application status updates, and overall reduced end-to-end processing times.</li> <li>■ Reinvigorate the client services staff.</li> </ul> <b>Major Deliverables:</b> <ul style="list-style-type: none"> <li>■ Client service training manuals for client service support staff and operational staff.</li> <li>■ Standardized client service response templates for client interactions across all channels.</li> <li>■ Process for updating manuals and response templates.</li> </ul>

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# Enterprise Information Management (EIM)

Initiative: Enterprise Information Management	Achieve Operational Excellence
<p><b>Description:</b> Achievement of the future state vision for IRCC will rely heavily on the ability to make business decisions using business intelligence and analytics. While this initiative is about GCMS Renewal and the creation of 'core engine' that will support the business and functional capabilities required by each program area in the future, all of that relies on a modern supporting data infrastructure. In order to leverage reliable information, IRCC first needs to establish an end-to-end EIM program to define and operationalize the governance, leadership and organizational structure that will be responsible and accountable for identifying and executing on information-centric decisions and priorities. A detailed EIM program will outline a method for record, case and data reconciliation, ensure higher data quality, ensure common interpretation of data throughout the organization, promote standardization of data input, and treat root causes of current data quality issues.</p>	
<p><b>Key Activities:</b></p> <ul style="list-style-type: none"> <li>Define the scope (e.g. subject area) and phasing of the EIM program; assigning staff roles and responsibilities that will enable IRCC future state data and analytic capabilities.</li> <li>Establish data governance that serves as the foundation for the EIM program.</li> <li>Establish standards for data management and implementation (e.g. data integration, data architecture &amp; design, data quality control), and undertake data quality activities as required.</li> <li>In light of transformation and GCMS Renewal, update the operating model for an IRCC-wide EIM program.</li> <li>Develop an EIM-specific technology roadmap that assesses and identifies gap closing technologies (e.g. data integration, master data management (MDM), BI tools) and integrates with the overall IRCC technology roadmap.</li> <li>Overall, heighten the quality and comprehensiveness of data, both for use internally at IRCC and externally with partners and OGDs.</li> </ul>	<p><b>Expected Benefits:</b></p> <ul style="list-style-type: none"> <li>Increased business alignment through establishing a foundation for a single version of truth (i.e. applicant, case, application).</li> <li>Set foundation for AI/algorithmic application assessment to reduce human intervention on simple, low risk cases.</li> <li>Establish foundation for improved data quality from upstream to downstream via the resolution of root cause of data quality issues.</li> <li>Improve IRCC ability to perform business analytics in order to enhance decision-making.</li> <li>Increase business ownership in defining how information is accessed and utilized (data stewardship).</li> </ul> <p><b>Major Deliverables:</b></p> <ul style="list-style-type: none"> <li>Program charter with organizational roles and responsibilities</li> <li>Information governance plan</li> <li>Conceptual information architecture</li> <li>Information flow diagrams (with identification of all source systems and input of critical data)</li> </ul>

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# Security Management

Initiative: Security Management		Achieve Operational Excellence	
<p><b>Description:</b> Through this transformation IRCC it is entirely possible that GCMS Renewal will examine, digitize and create more robust, identity and data, management and exploitation capabilities. Accordingly, IRCC must continue to develop its security and stewardship policies and practices to ensure a secure information management environment and protect against misuse or fraud. This will include a full analysis of potential security gaps and prospective business impacts. Security management also links directly with the Enterprise Information Management (EIM) initiative and these two activities are perhaps more important for IRCC as the federal government department that received more Access to Information and Privacy (ATIP) requests than any other federal government department.</p>			
<p><b>Key Activities:</b></p> <ul style="list-style-type: none"><li>▪ Establish liaison between security and information governance to define the security requirements and policies.</li><li>▪ Develop a top-down security approach to address not only prevention, but also effective detection, response and prediction of information misuse. Define and update the incident/event response process for security issues to include data leakage/loss, vendor personnel issues, and access violations including inappropriate use of resources.</li><li>▪ Identify and deploy required security tools including monitoring, controls and infrastructure to support IRCC security posture in the context of new technology developments.</li><li>▪ Increase focus on user activity and access monitoring.</li><li>▪ Develop/review security processes and standards for the information exchanges to OGDs services / applications.</li></ul>		<p><b>Expected Benefits:</b></p> <ul style="list-style-type: none"><li>▪ Enhanced security of IRCC client information</li><li>▪ Clarity on process and roles in critical incident response situations.</li><li>▪ Increased security hygiene.</li><li>▪ Improved security designs for architectural and process flexibility.</li></ul>	
		<p><b>Major Deliverables:</b></p> <ul style="list-style-type: none"><li>▪ Updated Control Policies and Processes for IRCC</li><li>▪ Security Management Framework</li><li>▪ Security Technology Roadmap</li></ul>	

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## Risk, Compliance and Audit

Initiative: Risk, Compliance and Audit		Achieve Operational Excellence	
<b>Description:</b> The transformation of GCMS service operation and delivery will impact many areas of IRCC and it will generate significant change. As program areas are impacted by new technologies and processes to support strategic business capabilities, IRCC should develop a comprehensive approach to assess enterprise risks and facilitate the legal, compliance and audit responses to these risks.			
<b>Key Activities:</b> <ul style="list-style-type: none"> <li>▪ Risk:               <ul style="list-style-type: none"> <li>▪ Conduct IRCC risk assessment across people, process and technology dimensions.</li> <li>▪ Establish consistent process for identifying risks and mitigation strategies.</li> </ul> </li> <li>▪ Compliance:               <ul style="list-style-type: none"> <li>▪ Complete assessment of current compliance and regulatory needs.</li> <li>▪ Develop internal processes for analysis and publication of compliance requirements.</li> </ul> </li> <li>▪ Audit:               <ul style="list-style-type: none"> <li>▪ Review and analyze auditing processes.</li> <li>▪ Develop tools to track and manage internal auditing and findings.</li> </ul> </li> <li>▪ Create a risk, compliance and audit strategy.</li> <li>▪ Determine the appropriate risk management, compliance and audit processes, along with the proper integration of knowledge management and document management capabilities.</li> </ul>		<b>Expected Benefits:</b> <ul style="list-style-type: none"> <li>▪ Enhance risk identification and mitigation.</li> <li>▪ Automation of compliance requirements and communication.</li> <li>▪ Improved efficiency of audit and legal operations.</li> <li>▪ Integrated, consistent approach to risk and risk-response.</li> </ul>	
		<b>Major Deliverables:</b> <ul style="list-style-type: none"> <li>▪ Risk Assessment – Maturity and Risk Identification</li> <li>▪ Compliance Assessment</li> <li>▪ Risk, Compliance and Audit Strategy and Implementation Roadmap</li> </ul>	

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# Analytics and Business Intelligence

Initiative: Analytics and Business Intelligence	Achieve Operational Excellence
<p><b>Description:</b> Replacing the GCMS / Seibel solution will bring a host of new capabilities and potential. To fully realize this potential, IRCC will need to ensure a robust analytics and business intelligence (BI) capability to accompany case management, workflow management, digital engagement etc. capabilities that GCMS Renewal will provide. Analytics and BI can enable more, holistic, applicant-centered, easy-to-use data from the new solution. Enabling more robust data and analytics capabilities will allow IRCC to create and implement comprehensive quality management processes at the organization and business unit level, enhance decision-making and set the foundation for potential AI and ML-enabled capabilities (e.g. low risk, high volume, non-complex application processes and workflows). These capabilities will be especially important considering the growing volumes of requests that IRCC is experiencing and likely to experience in the future with displaced people.</p>	
<p><b>Key Activities:</b></p> <ul style="list-style-type: none"> <li>▪ Refresh or create a strategy for analytics and BI at IRCC that includes definition of strategic enabling capabilities. This strategy should clarify major goals and actions (people, process and technology) that will combine to create an analytics and BI capability to support IRCC and all of its programs and services.</li> <li>▪ Conduct a detailed assessment of the current environment to underpin a complete data and BI strategy for IRCC, so that the GCMS Renewal is fully realized. This must include, roles and organization, technology infrastructure and analytical tools, data governance and data management processes. The gap analysis will inform analytics and BI requirements.</li> <li>▪ Based on the capabilities and architecture of the GCMS Renewal solution, design a data architecture and analytics solution (future state) that can take full advantage of the new GCMS platform. Conduct gap analysis to future state desired capabilities referencing supporting components including data integration, data quality, data warehousing, reporting and analytics.</li> <li>▪ Move to deployment and implementation mode: execute selection process for each component (conduct POC or “pilot” as needed) and then deploy as enterprise capability; identify or hire data scientists and data analysts as needed; make changes to RACI and data governance as required; ensure supporting policies and artefacts; create/change data and analytics processes as required.</li> </ul>	<p><b>Expected Benefits:</b></p> <ul style="list-style-type: none"> <li>▪ Enable operational and program analytics, policy analytics and support operational improvements.</li> <li>▪ Increased reporting accuracy and knowledge of current operations.</li> <li>▪ Enhanced decision-making capabilities – right information at the right time.</li> <li>▪ Support the improvement of client service efforts.</li> <li>▪ Support benefits realization of the GCMS Transformation program.</li> </ul> <p><b>Major Deliverables:</b></p> <ul style="list-style-type: none"> <li>▪ Current State Assessment</li> <li>▪ Articulation of Future State</li> <li>▪ Future State Analytics and BI Architecture Strategy</li> <li>▪ Analytics and BI Gap Analysis</li> <li>▪ Roadmap of Gap Closing Initiatives</li> </ul>

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# Knowledge Management

Initiative: Knowledge Management		Achieve Operational Excellence	
<b>Description:</b> The development a comprehensive knowledge management program will enable IRCC to fully capture knowledge content of all types (internal-focused and external-facing) in a standardized, collaborative and accessible manner. A robust knowledge management capability can underpin policy development by producing detailed and longitudinal data about service usage, and transitions between services (e.g. student permit to work permit).			
<b>Key Activities:</b> <ul style="list-style-type: none"> <li>▪ Create a working group to define knowledge management processes across IRCC.</li> <li>▪ Determine which technology applications and processes are used and each content type to best support collaboration, document management (e.g. GC Docs) and knowledge capture.</li> <li>▪ Determine how the IRCC technology infrastructure (e.g. intranet, enterprise search, content management, collaboration tools) can support IRCC staff and knowledge management efforts.</li> <li>▪ Identify how knowledge management components should be built into processes and tools in program areas.</li> </ul>		<b>Expected Benefits:</b> <ul style="list-style-type: none"> <li>▪ Reduced time to find critical information for IRCC staff – both policy and operations.</li> <li>▪ Enhance quality and accuracy of service delivery in programs by better leveraging the IRCC information asset.</li> <li>▪ Optimize employee's ability to perform work functions, enhance the on-boarding of new employees with common format and storage of organizational knowledge.</li> </ul>	
		<b>Major Deliverables:</b> <ul style="list-style-type: none"> <li>▪ Knowledge Management Content Inventory</li> <li>▪ Identification of Knowledge Management Leads by Program Area</li> <li>▪ Knowledge Management Implementation Roadmap</li> </ul>	

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# Hybrid Integration Platform

Initiative: Hybrid Integration Platform	Achieve Operational Excellence
<b>Description:</b> A hybrid integration platform (HIP) is a framework of on-premises and cloud-based integration and governance capabilities that enables differently skilled personas (integration specialists and non-specialists) to support a wide range of integration use cases. HIPs are not discrete solutions, but rather are assembled as a combination multiple integration technologies including: classic on-premises integration platforms, iPaaS, API management platforms and integration SaaS (iSaaS).	
<b>Key Activities:</b> <ul style="list-style-type: none"> <li>Analyze the current state of GCMS integration and identify gaps (in progress)</li> <li>Develop a hybrid integration strategy for GCMS, including future and transitional states and a roadmap for achieving the target state.               <ul style="list-style-type: none"> <li>Plan to deploy a HIP-inspired integration infrastructure, taking into account requirements arising from digital initiatives, such as cloud, web/mobile and automation.</li> <li>Take a highly pragmatic approach to selecting HIP building blocks and assume that IRCC might have to replace some of these components as GCMS is transformed and the HIP technology market matures and consolidates.</li> </ul> </li> <li>Implement the HIP plan by gradually introducing support for new constituents, new endpoints, use cases and deployment models (such as the cloud).</li> <li>Expect that not all elements of their integration infrastructure will be under their direct control, as integration capabilities may be embedded in other products and services, such as SaaS, mobile back-end services, and business process management (BPM) tools.</li> </ul>	<b>Expected Benefits:</b> <ul style="list-style-type: none"> <li>Enabling IRCC to rapidly integrate cloud, on-premises and web/mobile applications with diverse data sources and business networks.</li> <li>Enable IRCC to transform GCMS and the business capabilities it supports</li> <li>Improve maintainability and reliability of GCMS</li> </ul> <b>Major Deliverables:</b> <ul style="list-style-type: none"> <li>Current State Assessment</li> <li>Hybrid Integration Strategy</li> <li>HIP Future State Architecture</li> <li>Roadmap of Gap Closing Initiatives</li> </ul>

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# Digital Experience Platform

Initiative: Digital Experience Platform	Deliver a World Class Client Experience
<b>Description:</b> A digital experience platform (DXP) is an integrated set of core technologies that support the composition, management, delivery and optimization of contextualized digital experiences. DXPs entail a high degree of emphasis on interoperability and cross-channel continuity across the entire customer journey. DXP capabilities include experience composition and orchestration, management and delivery, complemented by analytics and customer data management. Multichannel support remains critical across all channels. DXPs combine and coordinate applications, including content management, search and navigation, personalization, integration and aggregation, collaboration, workflow, analytics, and mobile and multichannel support.	
<b>Key Activities:</b> <ul style="list-style-type: none"> <li>Analyze the current state and identify gaps in GCMS client experience capabilities</li> <li>Develop a business driven strategy for digital experience and define solutions for DXP and IAM.</li> <li>Implement an IAM system that provides a unified, applicationwide view of customer profile information and data.</li> <li>Implement the DXP iteratively:               <ul style="list-style-type: none"> <li>Identify and prioritize important customer journeys for improvement.</li> <li>Translate the improvement opportunities into business and technology imperatives.</li> <li>Secure the project owner and budget.</li> <li>Discover cross-program collaboration opportunities.</li> <li>Design the measurement of business impact on productivity and CX.</li> </ul> </li> </ul>	<b>Expected Benefits:</b> <ul style="list-style-type: none"> <li>Allow IRCC to provide clients seamless, timely and continuous access to relevant information, interactions and applications.</li> <li>Improve client experience by facilitating the application of user experience design practices</li> </ul>
	<b>Major Deliverables:</b> <ul style="list-style-type: none"> <li>Current State Assessment</li> <li>Digital Experience Platform and IAM Strategy</li> <li>Future State Architecture</li> <li>Roadmap of Gap Closing Initiatives</li> </ul>

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# Business Process Management and Automation Platform

Initiative: Business Process Management and Automation Platform	Achieve Operational Excellence
<b>Description:</b> In order to replace the Siebel and the core functionality of GCMS and effectively transform business processes, IRCC will need to implement an integrated business process management platform that includes strong customer service and engagement capabilities as well as business process automation capabilities to optimize workflows and reduce repetitive administration work.	
<b>Key Activities:</b> <ul style="list-style-type: none"> <li>▪ Evaluate the current state capabilities of GCMS against emerging requirements for engaging the customer across all appropriate channels.</li> <li>▪ Study the capabilities of modern case management systems to determine how the degree of support requirements map to the applications on the market.</li> <li>▪ Invest in defining future state business workflows and business process capabilities to maintain cross-channel, seamless, consistent and effortless customer experiences.</li> <li>▪ Determine the vendor shortlist for the core business process, case, and customer management system, and look at the product's degree of completeness to perform other critical tasks outside the core.</li> <li>▪ Determine the deployment and licensing model.</li> <li>▪ Select a solution that can support a holistic customer engagement strategy by promoting incremental delivery based on the most popular functions, and ensure success by expanding analytics capabilities to track KPIs and adjust as needed.</li> <li>▪ Augment the core system with additional solutions, such as RPA, to provide specific automation capabilities not directly within the scope of GCMS.</li> </ul>	<b>Expected Benefits:</b> <ul style="list-style-type: none"> <li>▪ Increase efficiency of IRCC lines of business</li> <li>▪ Improved effectiveness of IRCC lines of business</li> <li>▪ Consistent omni-channel client engagement</li> <li>▪ Renovation of the core GCMS platform to a solution that is viable over the long term</li> <li>▪ Improved non-functional system characteristics (performance, stability, scalability etc.)</li> </ul> <b>Major Deliverables:</b> <ul style="list-style-type: none"> <li>▪ Current State Assessment</li> <li>▪ Market Scan and Vendor Shortlist</li> <li>▪ BPM and Automation Solution Strategy</li> <li>▪ Future State Business Processes</li> <li>▪ BPM and Automation Implementation Roadmap</li> </ul>

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# Welcome To

## PR Spousal and Common-Law Partner Digital Journey Lab

### Core Team Kick-Off!

January 11<sup>th</sup>, 2021

# Agenda

<b>Timing</b>	<b>Topic</b>	<b>Facilitator</b>
1:00 – 1:15 pm	<b>Welcome and Introductions</b>	Ralph, Connie
1:15 – 1:45 pm	<b>Permanent Resident Digital Journey Lab Overview</b>	Kristy, Isabelle, Sakina, Connie
1:45 – 2:00 pm	<b>Key Upcoming Workshops</b>	Paul, Peter, Geet
2:00 – 2:15 pm	<b>Questions and Next Steps</b>	Connie

**Impact of labs!**



<https://vimeo.com/489083430>

# Agenda



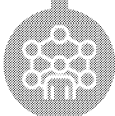
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2:00 – 2:15 pm	Questions and Next Steps	Connie

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# What is a Digital Journey lab?

- 
 A **fully dedicated, cross-functional, and co-located** team given the autonomy required to deliver a solution which fulfills client needs and drives organization outcomes within the context of client journeys
- 
 The **lab operates with enhanced speed and agility to deliver meaningful client experiences** in a rapid test-learn-release manner

# What does a Digital Journey Lab do?

- 
 Develops and **owns the roadmap for the reimagination** of client journey at IRCC
- 
**Redesigns client journey and delivers new solutions** by unifying cross functional talent
- 
**Incubates new agile culture**, emerging technologies, and new innovations within the department



## What can we expect to feel?

To reach our goal, **we will need to adopt new ways of working and collaborating.** At times, our way of working in the lab will differ substantially from our historical experience or preferences, and **may surface discomfit. Such feelings are expected,** and we are here to support one another and set the tone for the broader team .

As a leadership team, **it is key that we model the values and behaviours core to the lab, such as transparency and team-first.** We can leverage each other and broader communities to navigate through challenging moments

# Journey labs are organized around autonomous teams which are comprised of specific core roles that are empowered and fully dedicated

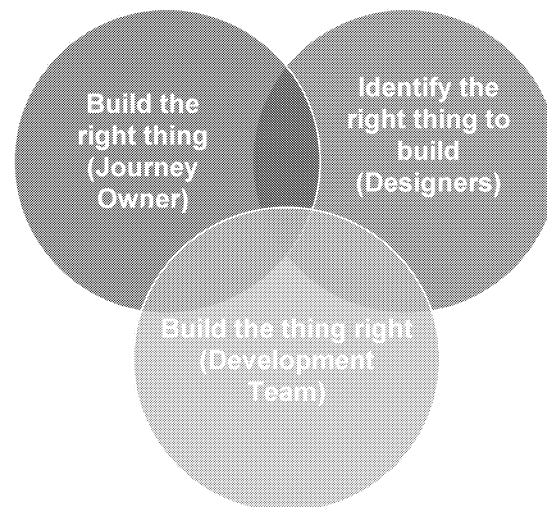
## Journey Owner and Analyst

- Responsible for **“building the right thing”** – realizing product vision, ROI; decision maker for tradeoffs and additional features/enhancements for the product
- Manages product backlog prioritization
- Acts as voice of the client
- Analysts support JOs create business cases and are the experts on process maps and test scenarios



## Scrum master

- Oversees the Scrum process and provides team and one-on-one coaching to **“build the thing fast”**
- Ensures the sprint team adheres to agile principles and leverages agile tools well
- Removes impediments to facilitate progress
- May support multiple sprint teams at scale



## Designers

- Works in close coordination to support the Journey Owner; is the team's expert on user needs
- Design client centric and data-oriented designs
- Conducts client interviews and helps JO define product roadmaps



## Development Team

- Tech Lead, Full-Stack Developers, QAs
- Responsible for **“building the thing right”** by delivering potentially shippable work at every sprint
- Staffed with cross-functional team members who are self-organizing and empowered
- Code, write, and perform automated tests; shared test responsibility to ensure no one tests their own code
- Members of the team take on Senior Technical responsibilities (e.g. design and architecture aligned with organizational standards)



## Coaches

- Provides necessary expertise and on-the-job mentoring to all Agile roles helping the team adopt the right Agile mindset as well as tools/practices
- Coaches are a one to many relationship at scale

## SMEs

- Bring specific knowledge of functions, business processes, products, etc. to solution design and execute implementation
- Help identify and resolve pain points and potential impediments in their areas of expertise
- Share best-practices across teams (e.g., architectures)

## Solution/Enterprise Architects

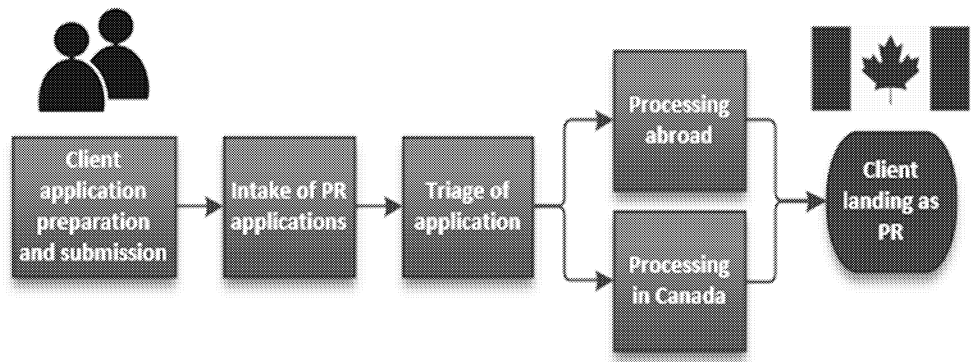
- Look ahead to inform and approve architecture & designs
- Ensure alignment with departmental and enterprise strategic visions
- Inform enterprise/departmental standards based on team level feedback loop

# PR SCLP - Team Roster

Role	Example responsibilities	Name	McKinsey Coach & support
<b>Journey Owner</b>	<ul style="list-style-type: none"> <li>Responsible for “building the right thing”, ensures product quality</li> <li>Creates and continuously manages product backlog</li> <li>Takes or elevates key product decisions</li> <li>Co-responsible for building reusable solutions</li> <li>Responsible for driving changes to ecosystem for current wave</li> </ul>	Bobby Dagenais	Geet & McGregor
<b>Analyst</b>	<ul style="list-style-type: none"> <li>Create and maintain business cases and help PO define product roadmap; Help JO define user stories and requirements</li> <li>Bringing right SMEs at right time to the table to get questions answered</li> </ul>	Ally Ansari	Geet & McGregor
<b>Lead Designer</b>	<ul style="list-style-type: none"> <li>Create and lead design strategy for client experience for channel</li> <li>Lead client centric design, user engagement plan, and conducts user testing</li> <li>Support creation, publication, and management of content across platforms</li> <li>Designs new process in respective area of expertise and bring mockups to life</li> </ul>	Jessica Lo	Peter Last
<b>Designers</b>	<ul style="list-style-type: none"> <li>Support client centric design, user engagement plan, and conducts user testing</li> <li>Support creation, publication, and management of content across platforms</li> <li>Designs new process in respective area of expertise and bring mockups to life</li> </ul>	Jill Rozensweig Pooja Patel	Peter Last
<b>Scrum Master</b>	<ul style="list-style-type: none"> <li>Ensures team is delivering/aligned on project vision and goals</li> <li>Promotes healthy team environment and removes impediments</li> <li>Facilitates the agile processes and practices</li> <li>Supports and coaches the team</li> </ul>	Paul Lee	Geet Chandratre
<b>Tech Lead</b>	<ul style="list-style-type: none"> <li>Leads technical vision and direction for product</li> <li>Responsible for stability, sustainability, and code quality</li> <li>Co-responsible for building reusable developments</li> </ul>	Marina Benet	Thanou Thirakul
<b>Tech (Full stack)</b>	<ul style="list-style-type: none"> <li>Develops code, writes unit tests and drive integrations</li> <li>Drives continuous improvement to the dev process</li> <li>Writes automated tests and owns quality of the product</li> <li>Understands code and is able to occasionally code for bug fixes and small features</li> <li>Creates and maintains overall test strategy and test data of the product</li> <li>Identifies gaps to ensure a client oriented quality product</li> </ul>	Alia Haleem Pareesh Dhabalia Ahmed Alwardani Irene Truong Waheed Ahmed Raheel Ahmed Anatolie Patrascu	Thanou Thirakul

# This cross-functional team will re-imagine how hundreds of thousands of clients experience the end to end journey of Permanent Residency in Canada

## Context



**Digital Labs rapidly scaling** to deliver an improved advisor experience and drive business impact

**Officer, Support-Worker, and Client interviews** shape understanding of pain points and priority features

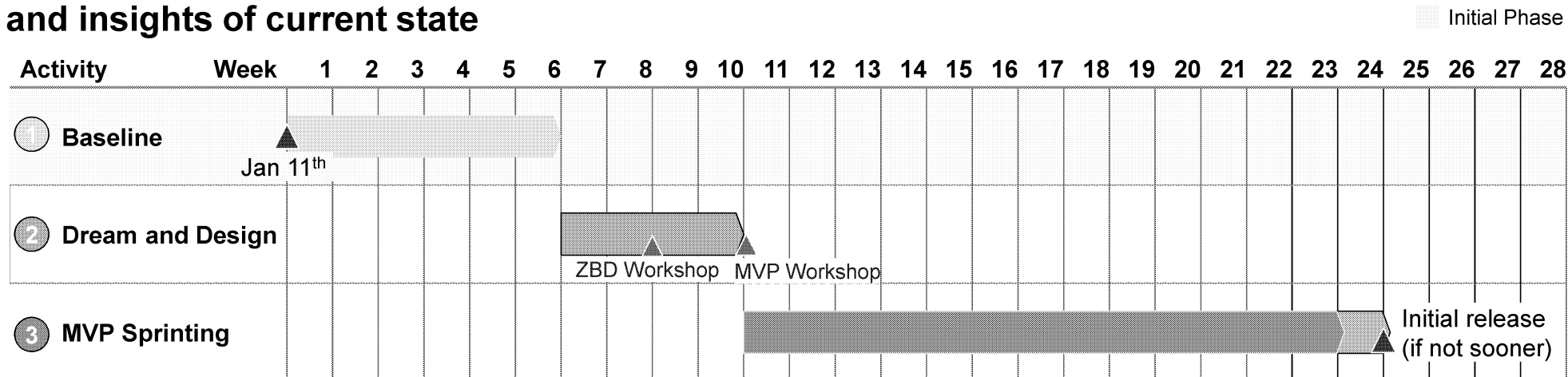
**Process mapping** of existing end-to-end experience (internal and external) helps pinpoint and contextualize opportunities

<b>Current Environment</b>	<b>Family class applications</b> are submitted via mail to our centralized processing centre in Sydney Nova Scotia.	<b>Applications are provisionally reviewed</b> and subsequently triaged out to processing offices in Canada and abroad for final decision.	<b>It is a relatively high profile program</b> with significant public interest and as such the department receives many client service inquiries.	<b>Eligibility requirements</b> for programs involve assessment of sponsors (Canadians or Permanent residents) as well as applicants.
<b>Potential Opp. Areas</b>	<b>Mapping a new workflow</b> for digital intake to meet modern client expectations in the new electronic application space.	<b>Digital triage and review of triage</b> criteria to more efficiently direct files to the correct processing office.	<b>Improvements to communications</b> with clients application status. Potential opportunity to explore proactive communication.	<b>Review the base requirements</b> in the legislation and find areas in our workflow where processes can be improved or leaned.

# Agenda

<b>Timing</b>	<b>Topic</b>	<b>Facilitator</b>
1:00 – 1:15 pm	<b>Welcome and Introductions</b>	Ralph, Connie
1:15 – 1:45 pm	<b>Permanent Resident Digital Journey Lab Overview</b>	Kristy, Isabelle, Sakina, Connie
1:45 – 2:00 pm	<b>Key Upcoming Workshops</b>	Paul, Peter, Geet
2:00 – 2:15 pm	<b>Questions and Next Steps</b>	Connie

# DRAFT TIMELINE - The PR lab is commencing the Baselining Phase: Developing an understanding and insights of current state



## Pre-baseline<sup>1</sup>

- Onboard Core team, identify and secure targeted support from SMEs
- Secure tools/infrastructure to commence remotely (IT), action activities with long lead time (e.g. building services, HR)

Priority activities	Baselining	Dream and Design	Sprinting
	Typically 4-6 weeks; commencing remotely <ul style="list-style-type: none"> <li>Define Vision/Purpose</li> <li>Sponsor onboarding</li> <li>Generative user research</li> <li>Build the team</li> <li>Bring physical lab to life</li> <li>Identify and quantify value levers</li> </ul>	Typically 4 weeks <ul style="list-style-type: none"> <li>Kick-off</li> <li>Zero based design</li> <li>Minimum viable product</li> <li>Business case</li> <li>Risk and Dependencies</li> </ul>	Typically 13-14 weeks <ul style="list-style-type: none"> <li>Tech/design tool set-up (Sprint 0)</li> <li>Backlog and user stories</li> <li>Client testing</li> <li>Sprint Planning</li> <li>Sprint Review (Demo)</li> <li>Moving to production</li> </ul>

<sup>1</sup> Not reflected on the chart, this phase of work ensures the core team is ready to commence Baselining through confirmation of key resources (HR, Tech, Other).

**DRAFT**

# The Zero-Based Design process is a full-day interactive workshop

## ILLUSTRATIVE

### Goal

The goal of the ZBD workshop is to re-design a process in a client-centric and collaborative way to create a truly distinctive experience

### Draft agenda

**10:00** Introduction, workshop objectives, energizer activity

**10:20** Introduction to Design Thinking

**10:30** Review User Insights & Introduce Personas

**12:00** *Lunch, check emails, etc.*

**12:45** Current State Macro-Journey & Empathy Exercise

**1:30** Inspirational Digital Experiences

**2:00** Future State Ideation

**3:00** *Break*

**3:15** Concept Prioritization

**3:45** Share Out of Results

**4:15** Wrap-up debrief and next steps

**Introduction:** Set expectations for what will be accomplished in the workshop, and where it fits into the larger project scope

**Empathize:** Review the synthesized outputs from the generative research phase and situate participants in the context of the lived experiences of end users

**Ideate:** Explore innovative and inspirational experiences before seeking to define a potential future state vision for the end user

**Consolidate:** Share out within groups of participants' designs and decide which designs or components of designs will form the basis of the unified vision for the product

### Example outputs



# MVP workshop allows to prioritize features to deliver maximum client value with minimal effort




ILLUSTRATIVE

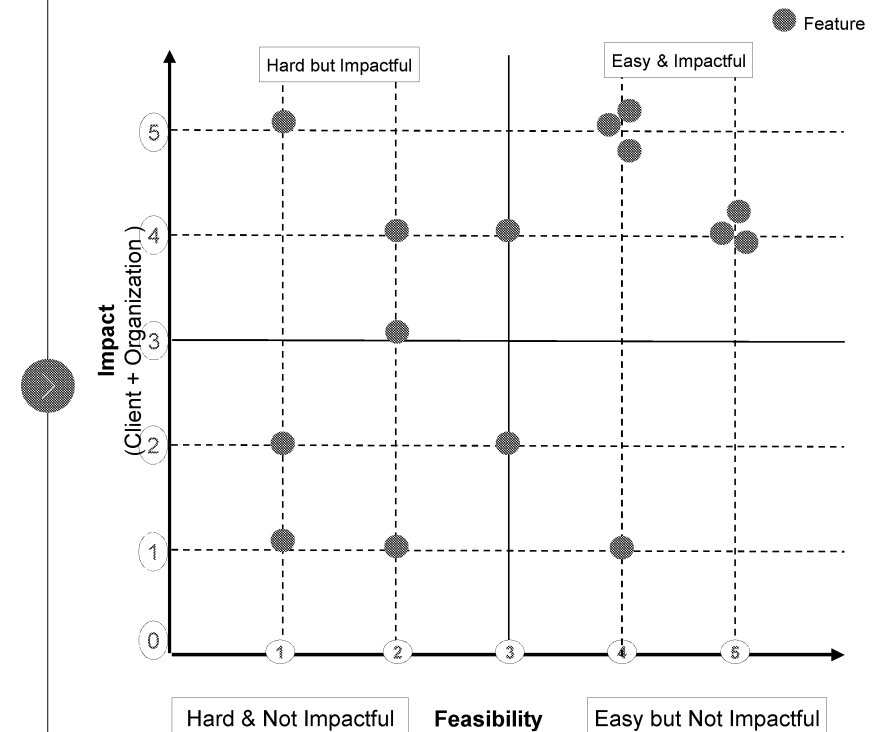
## Goal

### Draft agenda

The goal of the MVP workshop is to prioritize features coming out of the ZBD workshop and to map a Minimal Viable Product journey; further work on scope decisions will be required as follow-up to the workshop

### Example agenda

	Time	Topic	Format
<b>Provide background &amp; context</b> 	8:30 – 9:00	Welcome and ZBD Insights	Plenary
	9:00 – 9:15	MVP 101	Plenary
	9:15 – 9:45	Feature list questions	Plenary
	9:45 – 10:00	<i>Rating 101 : How we rate features</i>	<i>Plenary</i>
<b>Determine impact and feasibility</b> 	10:00 – 11:30	Functional Group Ratings (Client, Org, Tech)	Breakouts
	11:30 – 12:15	Lunch & Gallery Walk	..
	12:15 – 12:45	Cross Functional Recap, Learning & Discussion	Breakouts
	12:45 – 1:00	<i>Prioritization exercise</i>	<i>Breakouts</i>
<b>Define MVP with open questions &amp; next steps</b> 	1:00 – 1:30	Organize features based on rating & discuss	Plenary
	1:30 – 3:30	Choose features for MVP & open questions *Will include break	Plenary
	3:30 – 4:00	Debrief	Plenary





# Agenda


<b>Timing</b>	<b>Topic</b>	<b>Facilitator</b>
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2:00 – 2:15 pm	<b>Questions and Next Steps</b>	Connie

Key Baselining Activities – Week 1

Key Baselining Activities – Week 1						<div>Key milestones</div> <div><div>Team</div><div>Tech</div><div>Business</div><div>Design</div></div>
	Mon 11	Tues 12	Weds 13	Thurs 14	Fri 15	Key Outcomes
Team	Welcome & Kick-off	<div>Sprint planning</div> <div>Individual workstream PS</div>	<div>Daily stand-up</div> <div><div>SME introduction</div><div>SME Working session</div><div>Internal Sprint Review and Retro (introductory session)</div></div> <div>Daily check-out</div>			<div>Kick-off</div> <div>Alignment on SME role</div> <div>Alignment on workplan</div>
Business		<div>Review existing artifacts</div>	<div>SME kickoffs: Finance, Ops, Policy</div> <div>Request data pull</div>			<div>Request data pull</div> <div>E.g., process mapping, time in motion, financials, service standards</div> <div>Review existing artifacts</div>
Tech		<div>Review and codify existing PR architecture (integration, data, front-end, back-end etc.)</div> <div><div>Review TRV tech stack</div><div>Review Chinook tech stack</div><div>Request for PR security contact</div><div>Review CIT tech stack</div></div>				<div>Review existing artifacts</div> <div>Request data pull</div> <div>Identify and evaluate in flight projects related to PR; SCLP</div>
Design		<div>Review existing artifacts</div>	<div>Identify sources for existing client and agent process; design research approach</div> <div>Request data pull</div>			<div>Request relevant data pulls</div> <div>Review existing artifacts</div> <div>E.g., explore current CEB research and ideation</div>
	<div>Key milestones</div> <div>Kick-off (Mon, 01/11)</div>					

DRAFT

# We will begin our Sprint cadence from tomorrow to begin Baselining

 Cross-team sessions

Monday	Tuesday	Wednesday	Thursday	Friday
<div>930 – 1030 am Sprint Planning</div> <div>11 – 12pm Individual Workstream PS</div>	<div>9 – 9:15am Daily stand-up</div> <div>930 – 1030am Individual Workstream PS</div> <div>1030 – 12pm Work block</div>			<div>930 – 10:30am Sprint Retro</div>
<div>1 – 2pm Working session with SMEs</div> <div>2 – 4pm Work block</div> <div>4 – 415pm Individual Workstream EOD check-out</div>	<div>1 – 2pm Work Block</div>	<div>1 – 2pm Working session with SMEs</div>	<div>1 – 2pm Working session with SMEs (if needed)</div> <div>3 – 315pm Individual Workstream EOD check-out</div> <div>315 – 400pm Happy Hour</div>	<div>1 – 2pm Cross-team shareout</div> <div>1 – 4pm Work Block</div>



Thank you!

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# Citizenship Digital Journey Lab


## Core team kick-off

This document is for the internal use of The Department of Immigration, Refugees and Citizenship Canada (IRCC) and should not be disclosed in whole or in part outside of IRCC.





# Agenda

- 
- |               |   |
|---------------|---|
| 01:15 – 01:25 | Introductions and icebreaker  |
| 01:25 – 01:40 | Citizenship Digital Journey Lab: definition, scope, key reflections |
| 01:40 – 02:10 | Citizenship Digital Journey Lab: key upcoming workshops             |
| 02:10 – 02:30 | Mindsets and behaviours   |

## Icebreaker: Two truths and a lie



### Rules

---

- 1** Take 2 mins to write two brief truthful statements about yourself, and one lie – we want to get to know you!

---

- 2** Paste into chat

---

- 3** Team votes on which statement was the lie, winner tricks the most people

# Agenda

01:15 – 01:25

Introductions and icebreaker

01:25 – 01:40

Citizenship Digital Journey Lab: definition, scope, key reflections

01:40 – 02:10

Citizenship Digital Journey Lab: key upcoming workshops

02:10 – 02:30

Mindsets and behaviours



# What is an IRCC Digital Lab?

A **fully dedicated, cross-functional, and co-located** team given the autonomy required to deliver a solution which fulfills client needs and drives business outcomes within the context of client journeys.

The **lab operates with enhanced speed and agility to deliver meaningful customer experiences** in a rapid test-learn-release manner.

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# In an IRCC Digital Lab, a cross-functional team brings a re-imagined experience from ideation to market

## Organization

They transform the organization process. They define the scope, and plan the implementation.

>> **Viable**

## Design

They create a distinctive customer experience.  
They design concepts, build prototypes, and hold user testing sessions.

>> **Desirable**

## Subject matter experts

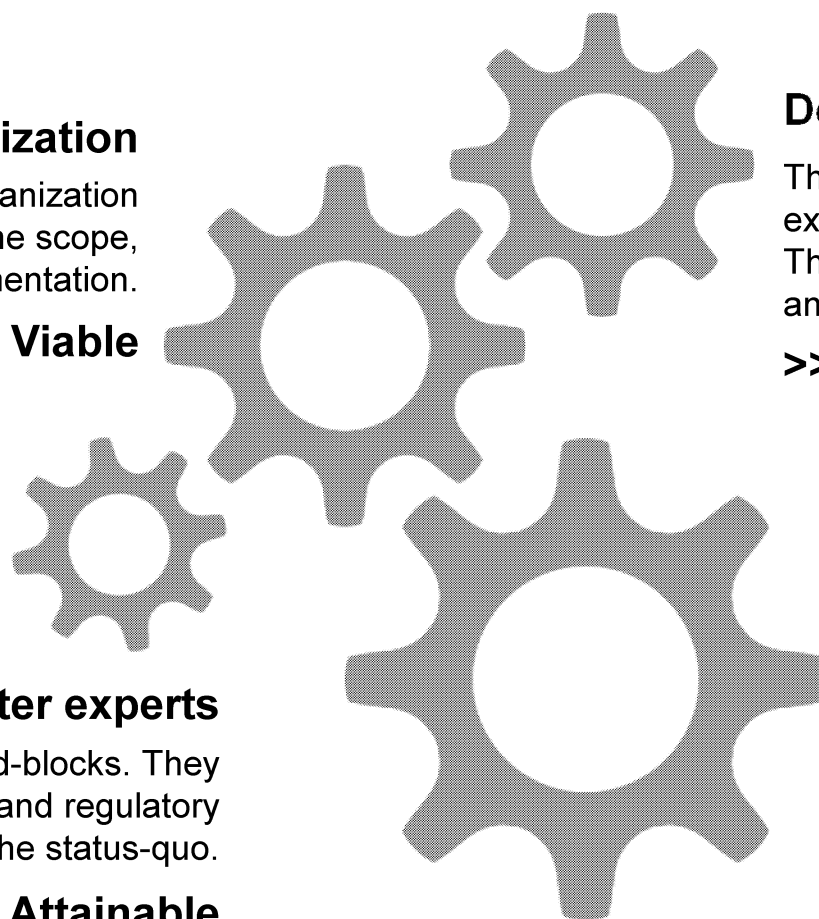
They remove road-blocks. They resolve legal, policy, and regulatory issues by challenging the status-quo.

>> **Attainable**

## Technology

They build the technology fast. They write code, integrate with core systems, and release software.

>> **Feasible**



# This cross-functional team will re-imagine how hundreds of thousands of clients experience the end to end journey of Citizenship in Canada

## Context



**Digital Labs rapidly scaling** to deliver an improved advisor experience and drive business impact

**Officer, Support-Worker, and Client interviews** shape understanding of pain points and priority features

**Process mapping** of existing end-to-end experience (internal and external) helps pinpoint and contextualize opportunities

## Current environment

**52% increase**

Total application received  
(2016/17 – 2018/19)

**250.2k**

Applications in 2018/19

**64%**

Proportion of apps processed  
within service standard (12M)

**-15%**

Uptake of Citizenship amongst  
those within 5-9 years of  
landing (1996 - 2016)

## Potential Opp. Areas

**Digital intake**

**Bulk processing**

**E-Scheduler**

**Online Test**

*.... And more initiatives  
identified by the organization  
that will be explored during  
baselining*


# What can we expect to feel?

To reach our goal, **we will need to adopt new ways of working and collaborating.** At times, our way of working in the lab will differ substantially from our historical experience or preferences, and **may surface discomfit. Such feelings are expected,** and we are here to support one another and set the tone for the broader team .

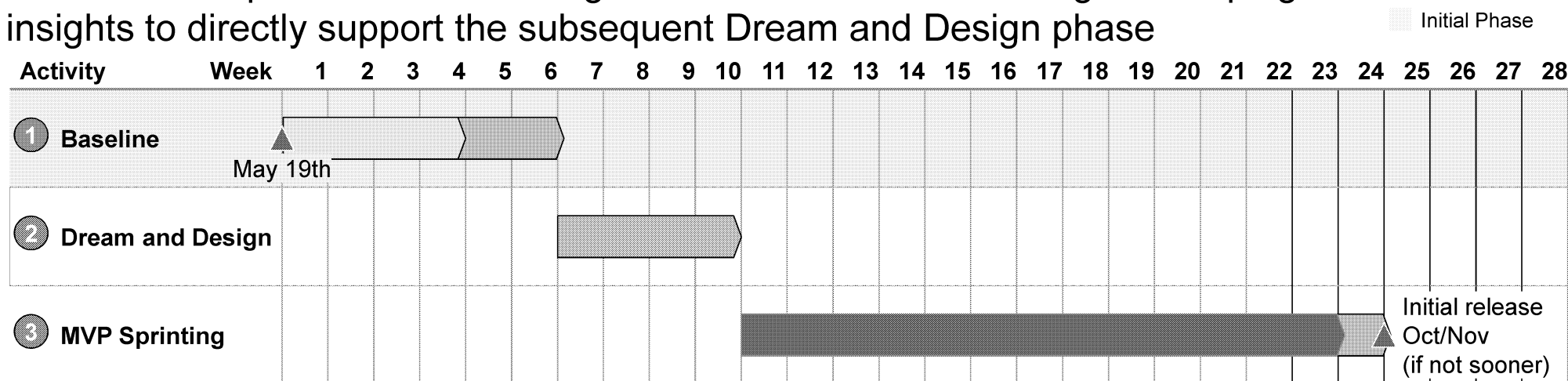
As a leadership team, **it is key that we model the values and behaviours core to the lab, such as transparency and team-first.** We can leverage each other and broader communities to navigate through challenging moments



# Agenda

- 
- 01:15 – 01:25 Introductions and icebreaker
- 01:25 – 01:40 Citizenship Digital Journey Lab: definition, scope, key reflections
- 01:40 – 02:10 Citizenship Digital Journey Lab: key upcoming workshops
- 02:10 – 02:30 Mindsets and behaviours

The Citizenship Lab is commencing with 4-6 weeks of Baselineing: developing artefacts and insights to directly support the subsequent Dream and Design phase



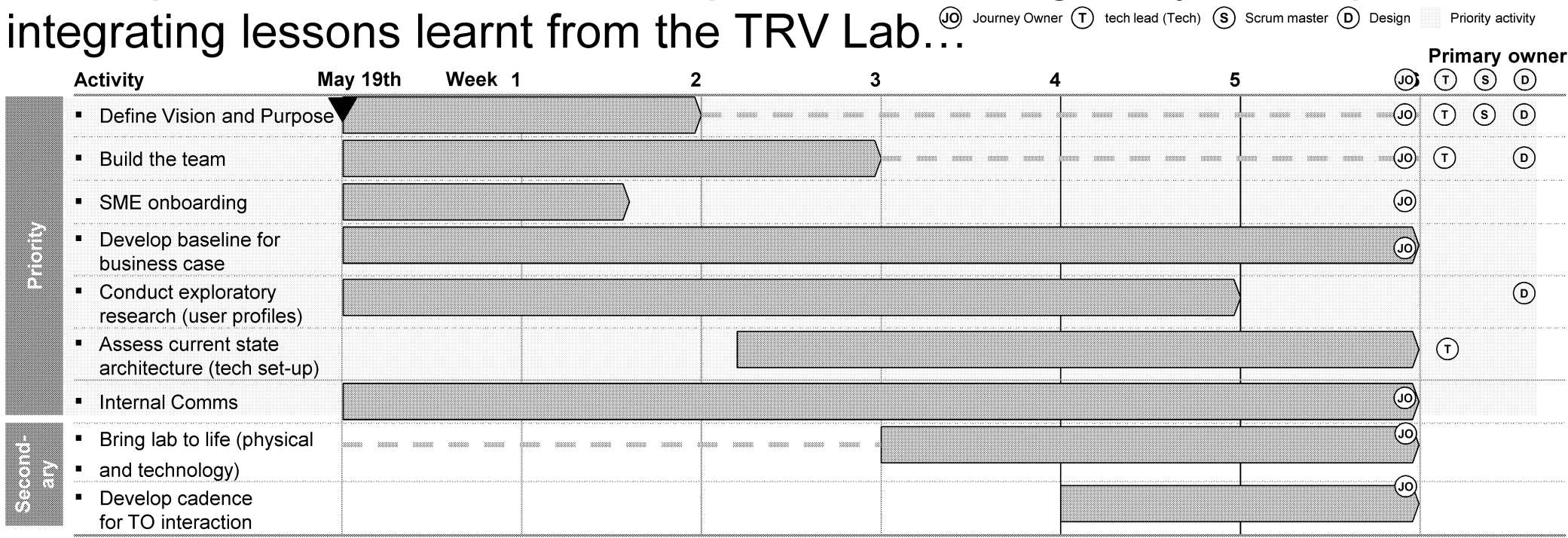
#### Pre-baseline<sup>1</sup>


- Onboard Core team, identify and secure targeted support from SMEs
- Secure tools/infrastructure to commence remotely (IT), action activities with long lead time (e.g. building services, HR)

Priority activities	Baselining	Launching (Dream and Design)	Development
	<i>[Typically 4-6 wks; commencing remotely]</i> <ul style="list-style-type: none"> <li>Define Vision/Purpose</li> <li>Sponsor onboarding</li> <li>Generative user research</li> <li>Build the team</li> <li>Bring physical lab to life</li> <li>Identify and quantify value levers</li> </ul>	<i>[Typically 4 wks]</i> <ul style="list-style-type: none"> <li>Kick-off</li> <li>Zero based design</li> <li>Minimum viable product</li> <li>Business case</li> <li>Risk and Dependencies</li> </ul>	<i>[Typically 13-14 wks]</i> <ul style="list-style-type: none"> <li>Tech/design tool set-up (Sprint 0)</li> <li>Backlog and user stories</li> <li>Client testing</li> <li>Sprint Planning</li> <li>Sprint Review (Demo)</li> <li>Moving to production</li> </ul>


<sup>1</sup> Not reflected on the chart, this phase of work ensures the core team is ready to commence Baselining through confirmation of key resources (HR, Tech, Other).

# A workplan to Baseline Citizenship has been thoughtfully developed, integrating lessons learnt from the TRV Lab...



**Success looks like**


- ✓ Core team and SMEs confirmed in week n-1
- ✓ Lab space set-up (location, hardware, software) by week 0
- ✓ Client research (personas developed and journeys defined); ready for week 1 ZBD in next phase of delivery: Dream & Design
- ✓ Prep for kick-off

**Be aware of**


- ✓ Exploratory research a critical input for effective ZBD
- ✓ Limitations on access to clients – build of research methods used for TRV
- ✓ Lead time for business case inputs
- ✓ Procurement of software, hardware and physical equipment launching requests early and following up frequently

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# Key roles in an IRCC Digital Lab: there are several key roles responsible for bringing the lab to life



## **Journey owner**

- Drives product vision and strategy, is responsible for “building the right thing”, aligned with organization strategy
- Understanding of program context
- Deep insight into IRCC and products
- Ability to shape product vision and roadmap
- Ability to navigate organization and manage senior stakeholders



## **Tech lead**

- Leads technical vision and direction for product, ensuring consistency with overall enterprise architecture
- Understanding of technical trade-offs that must be made to achieve desired features



## **Design lead**

- Design Client experience strategy for channel
- Lead Client centric design, user engagement plan, and conducts user testing
- Passion for solving client needs, and commitment to optimizing end-to-end client experience
- Ability to define and shape the target-state vision, deconstruct high level concepts into small pieces and reconstruct them into a holistic service design blueprint



## **Scrum master**

- Drives Agile process and ensure technology team delivers in line with product vision and goals
- Promotes healthy team environment and removes impediments
- Facilitates the agile processes and practices
- Supports and coaches the team



# Supporting each other as we embark on this journey together

## IRCC lab team leaders

## McKinsey support

<b>Business</b>	<b>Delia Scribeac</b>	Tom McCarthy
<b>Design</b>	<b>Aday Sami-Orungbe Marnie Andrews</b>	Peter Last
<b>Technology</b>	<b>Hussein Vastani</b>	Yanwing Wong, Thanou Thirakul
<b>Baseline and KPIs</b>	<b>Valentin Nedelcu</b>	Justice Betty
<b>Logistics and coordination</b>	<b>Daphne-Xavier Paquet Emily Preen</b>	Justice Betty, Tom McCarthy

**Connie Iatauro  
supported by  
McGregor  
Faulkner and  
Erez Eizenman  
to provide  
overall support**

# The team kick-off is a full-day interactive workshop

ILLUSTRATIVE

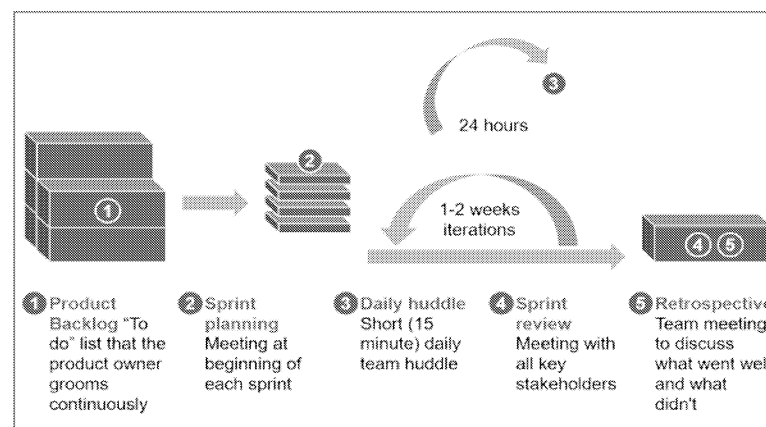
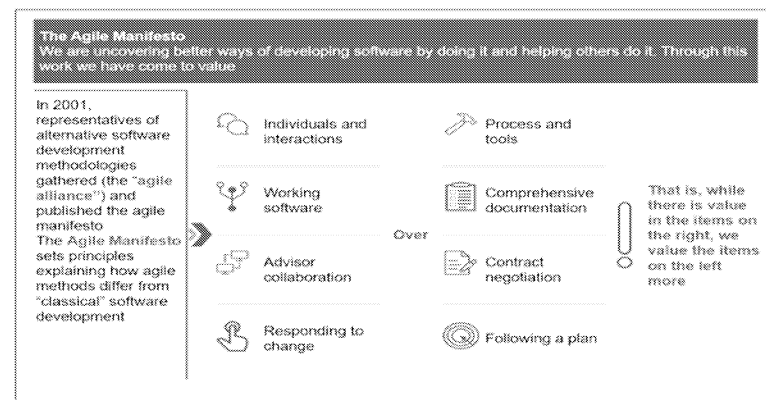
## Goal

- The goal of the kick-off workshop is to collaboratively develop a common understanding of agile methodology and start

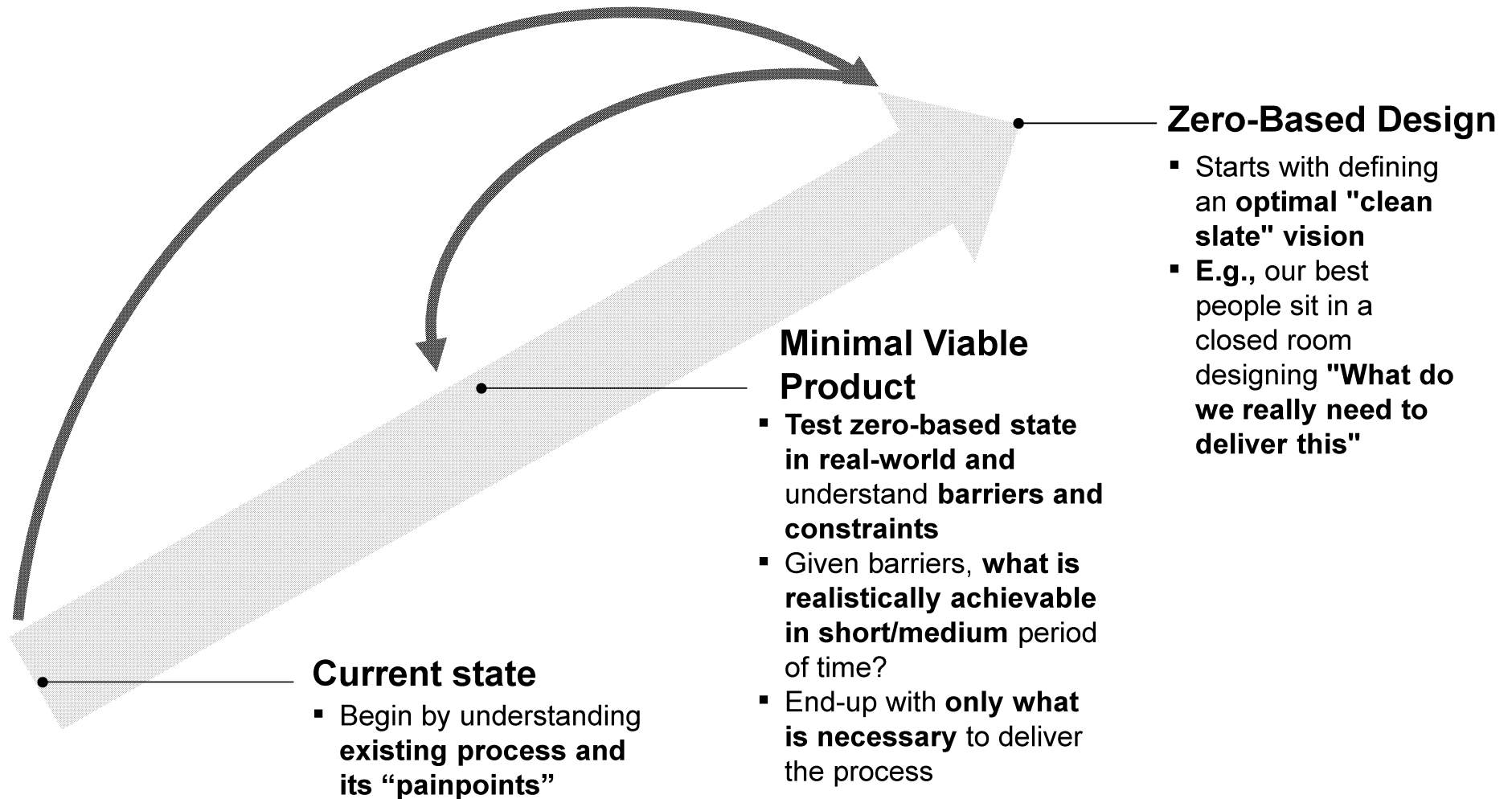
## Draft agenda

Time	Topic	Objective	Activity
09:00 – 09:05am	Welcome & objectives for the day	...	...
09:05 – 09:20am	Meet the team - icebreaker	...	Introduction to team
09:20 – 09:50am	Methodology we are learning today	Brief intro to the day	Description & video
09:50 – 10:00am	Break	...	...
10:00 – 10:10am	Introducing Alpine Bank Simulation	Set context for mortgage simulation	...
10:10 – 10:30am	Imagine an aspirational end-state: Design Thinking & Tools	Introduction to design thinking principles	Mortgage journey exercise
10:30 – 11:00am	Defining a pragmatic MVP	Introduction to MVP process	Going to the moon
11:00 – 11:10am	Break	...	...
11:10 – 12:00pm	Introducing Agile and Scrum	Understand basics of Agile	...
12:00 – 12:45pm	Paper prototyping in Agile sprints Sprint planning roleplay	Learn sprint planning	Prototype in 2 sprints
12:45 – 1.00pm	Closing & debrief	Wrap up kick off	Retro

## Example outputs



# Recap the basics of Zero-Based Design process before starting



ILLUSTRATIVE

# The Zero-Based Design process is a full-day interactive workshop

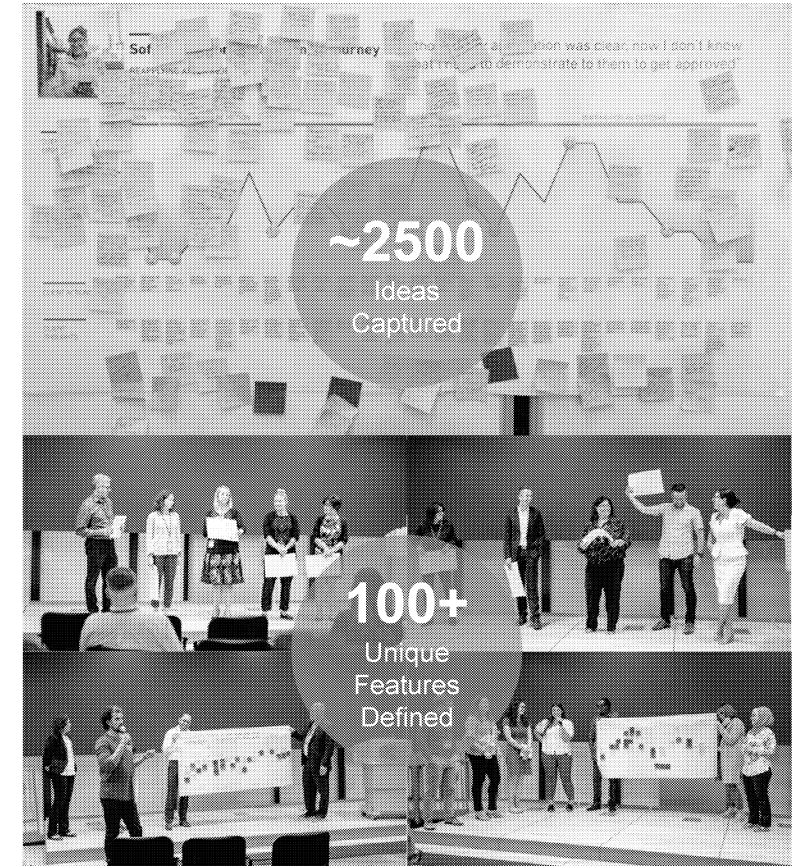
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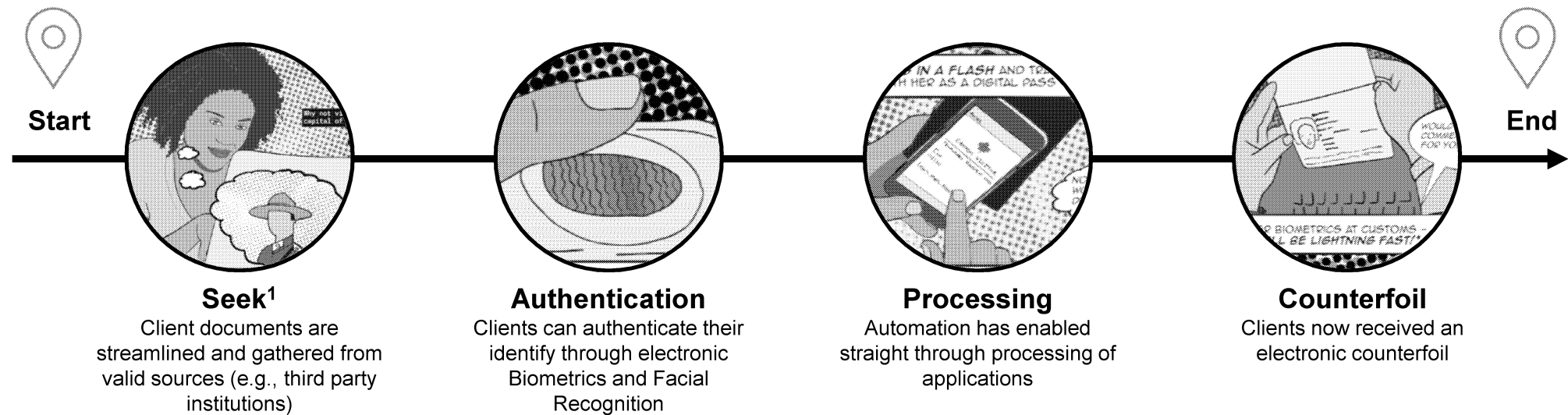
## Draft agenda

<b>10:00</b>	Introduction, workshop objectives, energizer activity	<b>Introduction:</b> Set expectations for what will be accomplished in the workshop, and where it fits into the larger project scope
<b>10:20</b>	Introduction to Design Thinking	
<b>10:30</b>	Review User Insights & Introduce Personas	
<b>12:00</b>	<i>Lunch, check emails, etc.</i>	<b>Empathize:</b> Review the synthesized outputs from the generative research phase and situate participants in the context of the lived experiences of end users
<b>12:45</b>	Current State Macro-Journey & Empathy Exercise	
<b>1:30</b>	Inspirational Digital Experiences	
<b>2:00</b>	Future State Ideation	<b>Ideate:</b> Explore innovative and inspirational experiences before seeking to define a potential future state vision for the end user
<b>3:00</b>	<i>Break</i>	
<b>3:15</b>	Concept Prioritization	
<b>3:45</b>	Share Out of Results	<b>Consolidate:</b> Share out within groups of participants' designs and decide which designs or components of designs will form the basis of the unified vision for the product
<b>4:15</b>	Wrap-up debrief and next steps	



## Example outputs






# As an example: Visitors Visa "North Star" exemplifies a reimagined 3-year roadmap for IRCC... DRAFT




## Impact

 Up to **80% reduction** in client time spent on researching and gathering documents  
 Increase in **program integrity**

 **<1 day** spent gathering and submitting biometrics

 **Straight through processing** for majority of applications  
 Increase in **program integrity**

 Up to **90% reduction** in counterfoil processing time

<sup>1</sup> Seek phase includes time spent by client researching, gathering documents, and filling out application

SOURCE: Zero based design workshop

# MVP workshop allows to prioritize features to deliver maximum customer value with minimal effort




ILLUSTRATIVE

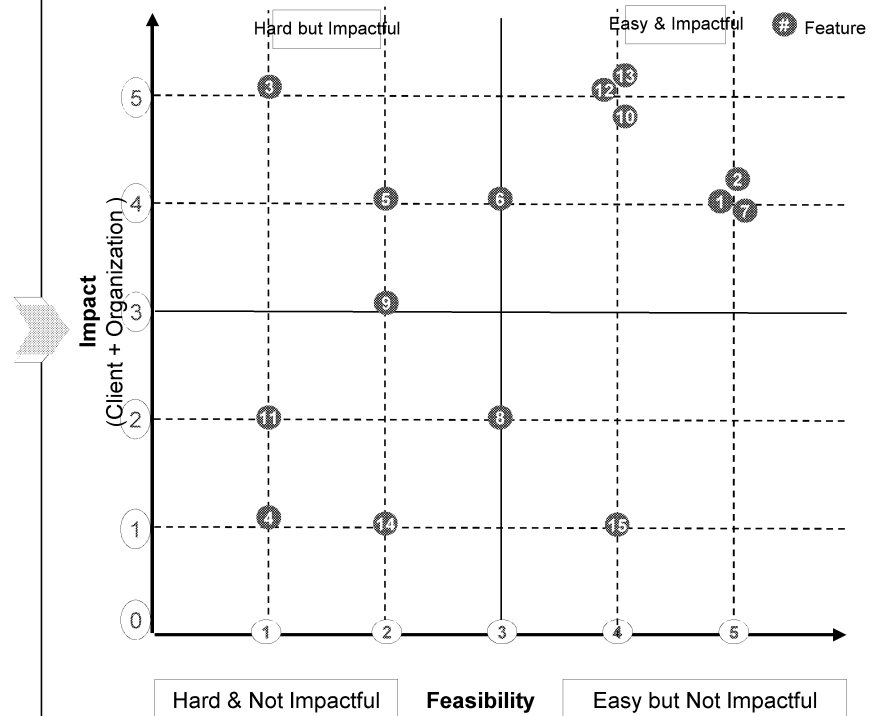
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	11:30 – 12:15	Lunch & Gallery Walk	..
	12:15 – 12:45	Cross Functional Recap, Learning & Discussion	Breakouts
	12:45 – 1:00	<i>Prioritization exercise</i>	<i>Breakouts</i>
Define MVP with open questions & next steps 	1:00 – 1:30	Organize features based on rating & discuss	Plenary
	1:30 – 3:30	Choose features for MVP & open questions *Will include break	Plenary
	3:30 – 4:00	Debrief	Plenary

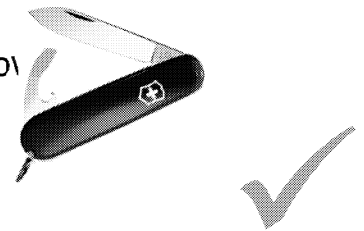


# It is crucial that all team members understand that a Minimum Viable Product (MVP) is the first release of the new product

## Description

### What is the MVP

- **The smallest thing you can build that delivers customer value** (core functionality valued the most) to a significant portion of the population that allows us to collect the most amount of information about user preferences with a minimal amount of effort



### What the MVP is NOT

- Full range of features and functionalities that the product should eventually contain
- Released product that includes a range of functionalities that only partially work




### Nature of MVP

- **The MVP evolves** based on new insights from customers and the team
- **Each Sprint we are adapting the MVP based on new information** from: more in-depth technical analysis, internal/external constraints and, most importantly, customer feedback
- The MVP is **considered the first MBI** (Minimum Business Increment).



# Agenda

- 
- 01:15 – 01:25 Introductions and icebreaker
- 01:25 – 01:40 Citizenship Digital Journey Lab: definition, scope, key reflections
- 01:40 – 02:10 Citizenship Digital Journey Lab: key upcoming workshops
- 02:10 – 02:30 Mindsets and behaviours



# The Agile Manifesto: 12 principles

**1**

Our highest priority is to satisfy the customer through early and continuous delivery of value

**2**

Welcome changing requirements, even late in development. Agile processes harness change for the customer's competitive advantage

**3**

Deliver working products frequently, from a couple of weeks to a couple of months, with a preference to the shorter timescale

**4**

Business people and developers must work together daily throughout the project

**5**

Build projects around motivated individuals. Give them the environment and support they need, and trust them to get the job done

**6**

The most efficient and effective method of conveying information to and within a development team is face-to-face conversation

**7**

Working product is the primary measure of progress

**8**

Agile processes promote sustainable development. The sponsors, developers, and users should be able to maintain a constant pace indefinitely

**9**

Continuous attention to technical excellence and good design enhances agility

**10**

Simplicity – the art of maximizing the amount of work not done – is essential

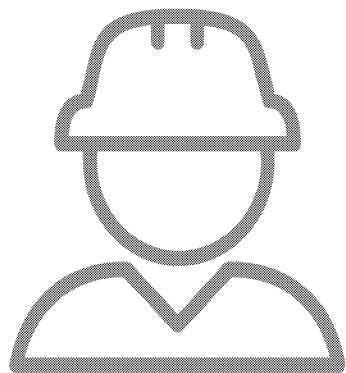
**11**

The best architectures, requirements, and designs emerge from self-organizing teams

**12**

At regular intervals, the team reflects on how to become more effective, then tunes and adjusts its behavior accordingly

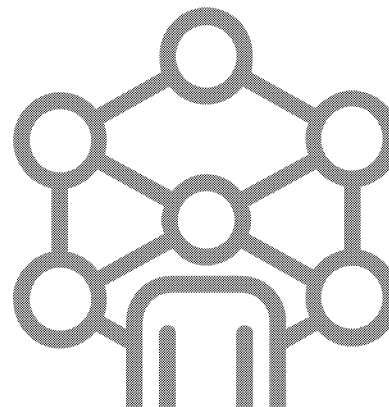
## Mindsets and behaviours: What great looks like for each role



**Journey  
Owner**



**Tech  
Lead**




**Scrum  
Master**



**Lead  
Designer**

**Let's talk about this as a group... this our team and our culture to shape!**

# Agenda

- 
- 10:00 – 10:30 Introductions and icebreaker
- 10:30 – 10:50 Citizenship Digital Journey Lab: definition, scope, key reflections
- 10:50 – 11:20 Citizenship Digital Journey Lab: key upcoming workshops
- 11:20 – 11:40 Mindsets and behaviours